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The market for melons in selected Western European countries

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Ministry of Overseas Development

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Contents

	Page
SUMMARY AND CONCLUSIONS	1
Sommaire et conclusions	3
Resumen y conclusiones	5
INTRODUCTION	8
PART I: SUPPLYING COUNTRIES	
Spain	9
Italy	9
France	10
Israel	10
Other countries	11
PART II: IMPORT TRADE	
General	12
The out-of-season market	12
Imports into individual countries	
The United Kingdom	15
The Federal Republic of Germany	15
France	16
Italy	17
Belgium/Luxembourg	18
The Netherlands	18
Switzerland	19
Sweden	20
Quality requirements, varieties etc	20
Harvesting, packing and handling	22
Barriers to trade	
Import tariffs	23
Phyto-sanitary regulations	24

Page

The market situation in individual countries 24

The United Kingdom 26

The Federal Republic of Germany 32

France 32

Italy 33

Belgium/Luxembourg 34

The Netherlands 35

Switzerland 35

Sweden 36

Inter-country comparison of prices 39

PROSPECTS 41

REFERENCES

APPENDICES

A Importers of melons 42

B Trade statistics 44

C Standard for watermelons 61

LIST OF TABLES IN TEXT

1 Imports of melons into selected Western European countries 1964–1973. 13

2 Out-of-season imports of melons 1963/64–1972/73 14

3 Average cif prices of melons imported into the United Kingdom 1969–1973. 26

4 Honeydew melons – average wholesale prices at Covent Garden Market 1969–1974. 27

5 Cantaloupe melons – average wholesale prices at Covent Garden Market 1969–1974. 29

6 Watermelons – average wholesale prices at Covent Garden Market 1969–1974. 30

7 Average annual cif prices of melons imported into the Federal Republic of Germany 1969–1973. 31

8 Average cif prices of melons imported into France 1969–1973. 32

9 Average cif prices of melons imported into Italy 1969–1973. 33

10 Average cif prices of melons imported into Belgium/Luxembourg 1969–1973. 34

11 Average cif prices of melons imported into the Netherlands 1969–1973. 34

12 Average cif prices of melons imported into Switzerland 1969–1973. 35

13 Average cif prices of melons imported into Sweden 1969–1973. 36

14 Comparison of cif import prices on the various European markets on a standard currency basis for 1973. 37

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NOTES

1. Metric tonnes and kilogrammes are the units of weight used throughout this report. Export values are expressed in pounds sterling (£) whereas import values and unit prices for importing countries are shown in their national currencies. However, there is a section using standardised prices, new pence (p) (100p = £1), where inter-country comparisons are made.

The reasons for using national currencies were as follows:—

(a) During the latter half of the period 1964—1973 there were several devaluations and revaluations which made the use of a standardised unit extremely difficult, particularly in respect of examining trends in individual markets.

(b) Exporters no doubt wish to know the price structure and likely returns for their produce in the currencies in which they will be paid; these will in general be the national currencies of the countries concerned.

2. It should be noted that throughout the text the Federal Republic of Germany, Belgium/Luxembourg, the Republic of South Africa and the Arab Republic of Egypt are referred to as Germany, Belgium, South Africa and Egypt respectively.

3. 'The EEC' refers to the six founder members and not to the enlarged Community.

The market for melons in selected Western European countries

SUMMARY AND CONCLUSIONS

1. The European market for melons can be divided into three distinct sectors; the market for honeydew melons, the market for watermelons and the market for Cantaloupes.

2. The major European suppliers of melons are Spain and Italy. Spain supplies mainly honeydew melons and Italy watermelons. Exports from Spain showed an upward trend until 1973 when there was a cutback in production. The UK is Spain's largest outlet. Italian exports stood at 58,000 tonnes in 1973 and Germany was Italy's largest single outlet. France is the only other major European supplier of melons.

3. The major non-European supplier is Israel; her exports have expanded greatly over the decade. Other suppliers include South Africa, Egypt, Chile, Morocco and Peru.

4. Suppliers in the Southern Hemisphere send melons to Europe in the European winter/spring and the other non-European suppliers, mainly southern Mediterranean countries, send melons to Europe in the summer, just before Spanish and Italian exports come on the market. Honeydew melons comprise the bulk of out-of-season imports in all the countries surveyed.

5. Total imports into the eight countries under review have risen from 69 227 tonnes in 1964 to 165 170 tonnes in 1973 – see Table 1, page 13. The UK and Germany are the largest markets, followed by France. Most of the increase in imports in the decade was met by increased supplies from Italy and Spain.

6. The out-of-season market for melons, ie November to early June, is discussed. With the exception of the UK (and Sweden in later years) it has grown – thus presenting good opportunities for new suppliers.

7. Imports into individual European countries are examined. With the exception of the UK in 1972 and 1973, all countries experienced an increase in imports of melons.

8. The market shares of the three types of melon are calculated. Imports of honeydews dominate the market in the UK and are of major importance in the Netherlands and Sweden; imports of watermelons dominate the German, French and Italian markets and Cantaloupes are of primary importance on the Belgian and Swiss markets. Imports of all types of melons are tending to increase as total imports rise, though the greatest absolute increase has occurred in imports of watermelons and honeydew melons.

9. For European markets melons should be mature, clean, free from blemish or damage, and well-graded for size and appearance. There is a European standard for watermelons which can be used for guidance by producers supplying the EEC. This standard provides for two quality classes and four weight grades, the minimum permitted weight being 1.5 kg (3 lb 5 oz) – for further details see Appendix C.

10. There are three main varieties of honeydew melon on sale in Europe: the Elche or Tendral, the Liso and the white honeydew melon. The two main varieties of Cantaloupes exported are the Charentais and the Ogen. Some watermelon varieties are Sugar Baby, Chilean Black and Calabar.

11. Various packing methods are used. Honeydews are often packed in wooden trays, but fibreboard cartons are now being used. Cantaloupes and watermelons are often packed in fibreboard cartons although French exporters of Charentais melons often use wooden trays. Air-freighted melons are always packed in fibreboard cartons. Careful handling ensures that melons arrive in good condition, and some countries are now palletizing consignments. Size grading is especially important as it improves the appearance of the pack and facilitates pricing at retail level where 'per piece' selling is practised.

12. Barriers to trade in the form of tariffs and phyto-sanitary regulations are discussed. Switzerland and the EEC countries have one tariff rate extending throughout the year, as does the UK, which is bringing her tariff into alignment with the EEC tariff. Sweden's tariff rate changes according to the time of year. Sweden, France and Germany all have phyto-sanitary regulations which must be complied with.

13. The implications of UK entry into the EEC in relation to tariff changes are considered. There is not expected to be any overall shift in the type of melon imported, but rather a minor shift in the source of supply – either to existing EEC producers or to ACP countries.

14. Most imports of melons arrive in Europe between June and September: June and July are the peak months for imports into Italy; July and August for imports into Germany, France, Belgium, the Netherlands, Switzerland and Sweden, and August and September for imports into the UK. Watermelons, honeydews and Cantaloupes all appear on these markets between June and September; imports during the rest of the year are very low and consist mainly of honeydews with some Cantaloupes.

15. Most watermelons and honeydews are sold to retail outlets, ie fruiterers/ greengrocers and supermarkets, although some go to the catering trade, especially honeydews in the out-of-season period. Cantaloupes are also sold in retail outlets, but a greater proportion (especially of Ogens) go to the catering industry in the UK, Germany and Switzerland.

16. Average cif prices are quoted for melons from various sources. In some countries an upward price trend is evident; in others no trend is evident. However, Spanish melons rose in price in almost every country in 1973.

17. A wholesale price series is only available for the UK. Prices for honeydews are lowest between August and October, and for watermelons in August. The highest prices for Cantaloupes tend to be reached between January and May when Israeli fruit is not available and supplies are short.

18. An inter-country price comparison, using average annual cif prices, shows that in all the countries considered watermelons fetch the lowest import price, followed by honeydews; Cantaloupes make the highest import price overall. It appears that the German and Swiss markets offer the best fob returns to an exporter.

19. No statistical projections could be made regarding future demand for the various types of melon, but no great change is expected in the dominance of particular melons on the various markets.

20. It appears that most opportunity exists for a new supplier able to send either honeydews or, in some countries, air-freighted Ogens, during the period January to May. This fruit must be of high quality and competitively priced.

RESUME ET CONCLUSIONS

La marché des melons dans certains pays d'Europe occidentale

1. Le marché européen des melons peut être divisé en trois secteurs distincts: le marché des melons sucrins, le marché des pastèques et le marché des melons cantaloups.

2. Les principaux fournisseurs européens de melons sont l'Espagne et l'Italie. L'Espagne fournit principalement des melons sucrins et l'Italie des pastèques. Les exportations venant d'Espagne ont présenté une tendance à l'augmentation depuis 1973, lorsqu'il y a eu un retour en arrière dans la production. Le Royaume-Uni est le plus important débouché de l'Espagne. Les exportations italiennes s'élevaient à 58.000 tonnes en 1973 et l'Allemagne était le plus important débouché de l'Italie. La France est le seul autre fournisseur européen important de melons.

3. Le principal fournisseur non-européen est Israel; ses exportations se sont élargies considérablement au cours de ces dix années. Les autres fournisseurs sont l'Afrique du Sud, l'Egypte, le Chili, le Maroc et le Pérou.

4. Les fournisseurs situés dans l'hémisphère sud expédient les melons en Europe dans la période européenne hiver/printemps et les autres fournisseurs non-européens, principalement les pays du sud méditerranéen, expédient les mélons en Europe en été, juste avant que les exportations provenant d'Espagne et d'Italie n'apparaissent sur le marché. Les melons sucrins constituent la plus grosse partie des importations hors-saison dans tous les pays considérés.

5. Le total des importations dans les huit pays considérés a augmenté de 69.227 tonnes en 1964 à 165.170 tonnes en 1973 — voir tableau 1, page 13. Le Royaume-Uni et l'Allemagne sont les marchés les plus importants, suivis par la France. La plus grande partie du surplus des importations au cours des dix dernières années a été couverte par les fournitures accrues venant d'Italie et d'Espagne.

6. Le marché hors-saison des melons, c'est-à-dire de novembre au début de juin, est discuté. A l'exception du Royaume-Uni (et de la Suède au cours des dernières années), il s'est développé — offrant ainsi des occasions favorables pour de nouveaux fournisseurs.

7. Les importations dans les différents pays européens sont examinées. A l'exception du Royaume-Uni en 1972 et 1973, il y a eu une augmentation des importations de melons dans tous les pays.

8. Les parts des trois types de melons sur le marché sont calculées. Les importations des melons sucrins occupent la premiére place du marché au Royaume-Uni et présentent une importance majeure aux Pays-Bas et en Suède; les importations de pastèques dominent les marchés en Allemagne, en France et en Italie, et les melons cantaloups ont une importance primordiale sur les marchés belge et suisse. Les importations de tous les types de melons ont tendance à augmenter à mesure que les importations totales augmentent, bien que, en valeur absolue, la plus forte augmentation se soit produite dans les importations des pastèques et des melons sucrins.

9. Pour les marchés européens, les melons doivent être mûrs, propres, sans taches ni détériorations et bien triés en ce qui concerne la taille et l'aspect. Il existe une norme européenne pour les pastèques, qui peut être utilisée à titre indicatif par les producteurs fournissant la CEE. Cette norme prévoit deux classes de qualité et quatre niveaux de poids, le poids minimum admis étant de 1,5 kg 3lb 5oz — pour d'autres détails, voir annexe C.

10. Il y a trois principales variétés de melon sucrin sur le marché en Europe: le Elche ou Tendral, le Liso et le melon sucrin blanc. Les deux principales variétés de melons cantaloups exportés sont le Charentais et l'Ogen. Quelques variétés de pastèques sont Sugar Baby, Chilean Black et Calabar.

11. On utilise diverses méthodes d'emballage. Les sucrins sont souvent emballés dans des casiers en bois, mais le carton dur est aussi utilisé actuellement. Les melons cantaloups et les pastéques sont souvent emballés dans des cartons en carton dur, bien que les exportateurs français de melons charentais utilisent souvent des plateaux en bois. Les melons expédiés par air sont toujours emballés dans des cartons en carton dur. Une manipulation soigneuse garantit le bon état des melons à leur arrivée et certains pays utilisent actuellement la palletisation des colis. Le classement par taille est particulièrement important, car il améliore l'aspect de l'emballage et facilite la fixation des prix au niveau du commerce de détail où la vente 'à la pièce' est pratiquée.

12. Les obstacles au négoce sous forme de tarifs douaniers et de réglementations phyto-sanitaires sont discutés. La Suisse et les pays de la CEE ont un taux de tarif douanier s'étendant sur toute l'année, comme c'est le cas pour le Royaume-Uni qui ajuste son tarif douanier sur celui de la CEE. En Suède, le taux du tarif douanier varie suivant l'époque de l'année. La Suède, la France et l'Allemagne ont tous des réglementations phyto-sanitaires avec lesquelles il y a lieu de compter.

13. Les conséquences le l'entrée du Royaume-Uni dans la CEE en liaison avec les changements des tarifs douaniers sont examinées. On ne s'attend pas à un changement général dans le type de melons importés, mais plutôt à un changement peu important en ce qui concerne la source d'approvisionnement — soit vers les producteurs existants de la CEE soit vers les pays de l'ACP.

14. Les importations de melons arrivent en Europe en majeure partie entre juin et septembre: juin et juillet sont les mois de pointe pour les importations en Italie; juillet et août pour les importations en Allemagne, en France, en Belgique, aux Pays-Bas, en Suisse et en Suède, et août et septembre pour les importations au Royaume-Uni. Les pastèques, les melons sucrins et les melons cantaloups font tous leur apparition sur ces marchés entre juin et septembre; les importations pendant le reste de l'année sont faibles et consistent essentiellement en melons sucrins avec une certaine quantité de melons cantaloups.

15. Les pastéques et les melons sucrins sont vendus en majeure partie aux commerces de détail, c'est-à-dire magasins de fruits et légumes et super-marchés, bien qu'une certaine partie aille à l'industrie alimentaire, en particulier les melons sucrins dans la période hors-saison. Les melons cantaloups sont également vendus aux commerces de détail, mais une plus forte proportion (particulièrement d'Ogens) est destinée à l'industrie alimentaire au Royaume-Uni, en Allemagne et en Suisse.

16. Les prix cif moyens sont cités pour les melons provenant de diverses sources. Dans certains pays, il y a une tendance nette à l'accroissement des prix; dans d'autres, il n'y a pas de tendance nette. Toutefois, le prix des melons espagnols a augmenté dans presque tous les pays en 1973.

17. On ne dispose d'une liste de prix de gros que pour le Royaume-Uni. Les prix des melons sucrins sont les plus bas entre août et octobre, et ceux des pastèques en août. Les prix des melons cantaloups tendent à être les plus élevés entre janvier et mai en l'absence de fruits d'Israël et lorsque les approvisionnements sont peu importants.

18. Une comparaison des prix entre pays, en utilisant les prix cif annuels moyens, montre que dans tous les pays considérés les pastèques atteignent le prix d'importation le plus bas, suivies des melons sucrins; le prix d'importation des melons cantaloups est le plus élevé dans tous les pays. Les marchés d'Allemagne et de Suisse semblent offrir les meilleurs bénéfices fob à un exportateur.

19. Aucune prévision statistique n'a pu être faite en ce qui concerne la demande future des divers types de melons, mais on ne s'attend pas à un changement important de la prédominance des types particuliers de melons sur les divers marchés.

20. Il semble qu'il existe le plus de perspectives pour un nouveau fournisseur susceptible de fournir soit des melons sucrins soit, dans certains pays, des Ogens expédiés par air, pendant la période de janvier à mai. Ces fruits doivent être de qualité élevée et leur prix doit être compétitif.

RESUMEN Y CONCLUSIONES

El mercado de melones en algunos paises de Europa Occidental

1. El mercado europeo de melones se puede dividir en tres sectores distintos: El mercado de melones dulces ('honeydew'), el de sandías y el de melones Cantaloupe.

2. Los principales suministradores europeos de melones son España e Italia. España suministra principalmente melones dulces e Italia sandías. Las exportaciones españolas mostraron una tendencia alcista hasta 1973, en que hubo una reducción en la producción. El Reino Unido es el principal importador de melones españoles. Las exportaciones italianas se elevaron a 58.000 toneladas en 1973, siendo la República Federal de Alemania el mayor importador individual de melones italianos. Francia es el otro único país europeo importante suministrador de melones.

3. El principal suministrador no europeo es Israel; sus exportaciones se han expandido grandemente en la última década. Otros suministradores son Sudáfrica, Egipto, Chile, Marruecos y Perú.

4. Los suministradores del hemisferio Sur envían melones a Europa durante el periodo europeo de invierno/primavera, y los otros suministradores no europeos, principalmente los países mediterráneos del Sur, envían melones a Europa durante el verano, justamente antes de que las exportaciones españolas e italianas lleguen al mercado. Los melones dulces constituyen el grueso de las importaciones fuera de estación de todos los países.

5. El total de las importaciones en los ocho países estudiados se elevó de 69.227 toneladas en 1964 a 165.170 toneladas en 1973 — véase Tabla 1, página 13. El Reino Unido y la República Federal de Alemania son los principales mercados, seguidos de Francia. La mayor parte del incremento en las importaciones de la década citada se cubrieron con los suministros crecientes procedentes de Italia y España.

6. Se estudia el mercado de melones de fuera de estación, es decir, desde noviembre hasta primeros de junio. A excepción del Reino Unido y Suecia en los últimos años, este mercado ha mostrado una tendencia creciente, presentando, por tanto, buenas oportunidades para nuevos suministradores.

7. Se examinan las importaciones en los países europeos individualmente. Con la excepción del Reino Unido en 1972 y 1973, todos los países experimentaron un incremento en las importaciones de melones.

8. Se calcula la participación en el mercado de los tres tipos de melones. Las importaciones de melones dulces dominan el mercado en el Reino Unido y son de gran importancia en Holanda y Suecia; las importaciones de sandías dominan el mercado alemán, francés e italiano, y las de melones Cantaloupe son de importancia fundamental en el mercado belga y suizo. Las importaciones de todos los tipos de melón tienden a aumentar de acuerdo con la elevación de las importaciones totales, aunque el mayor incremento absoluto ha tenido lugar en las importaciones de sandías y melones dulces.

9. Para los mercados europeos, los melones deben ser maduros, limpios, sin defectos ni daños y perfectamente normalizados por tamaño y apariencia. Existen unas normas europeas de calidad para las sandías, que pueden utilizarse como guía por los países productores suministradores de la CEE. Estas normas incluyen dos categorías de calidad y cuatro calibres diferentes por peso, siendo el peso mínimo permitido de 1,5 kg (3 libras 5 onzas) — para más detalles véase el Apéndice C.

10. Hay tres variedades principales de melones dulces de venta en Europa: el Elche o Tendral, el Liso y el melón blanco. Las dos principales variedades de los melones Cantaloupe exportados son la Charentais y la Ogen. Algunas variedades de sandía son la Sugar Baby, la Chilean Black y la Calabar.

11. Se utilizan varios métodos de embalaje. Los melones dulces a menudo se embalan en bandejas de madera, pero ahora se están usando cartones de fibra. Los Cantaloupes y las sandías a menudo se embalan en cartones de fibra, aunque los exportadores franceses de melones Charentais usan con frecuencia bandejas de madera. Los melones envíados por vía aérea se embalan siempre en cartones de fibra. La manipulación cuidadosa asegura que los melones lleguen en buenas condiciones y algunos países están ahora paletizando los envíos. La calibración por tamaño es especialmente importante, ya que mejora el aspecto del embalaje y facilita la fijación de precios en la venta al por menor, donde se practica la venta'por pieza'.

12. Se discuten las barreras comerciales en forma de tarifas aduaneras y reglamentaciones fitosanitarias. Suiza y los países de la CEE han establecido una tarifa a lo largo del año, al igual que el Reino Unido, el cual está alineando sus tarifas con las de la CEE. Los tarifas de Suecia varían de acuerdo con la época del año. Suecia, Francia y la República Federal de Alemania tienen unas reglamentaciones fitosanitarias obligatorias.

13. Se consideran las implicaciones de la entrada del Reino Unido en la CEE en relación con los cambios de tarifas. No se espera que haya un giro radical en cuanto al tipo de melones importados, sino más bien un giro ligero en cuanto a la fuente de suministros – bien hacia los países productores de la CEE, o bien hacia los países asociados.

14. La mayor parte de las importaciones europeas de melones se realizan entre junio y septiembre: junio y julio son los meses punta de las importaciones a la Italia y julio y agosto de las importaciones a la República Federal de Alemania, Francia, Bélgica, Holanda, Suiza y Suecia; y agosto y septiembre de las importaciones al Reino Unido. Las sandías, melones dulces y los Cantaloupes aparecen en dichos mercados entre junio y septiembre; las importaciones durante el resto del ano son muy bajas y están constituídas por melones dulces principalmente y algunos Cantaloupes.

15. La mayor parte de las sandías y melones dulces se destinan a la venta al por menor, es decir, fruterías/verdulerías y supermercados, aunque algunos van a empresas distribuidoras de productos preparados, especialmente los melones dulces en épocas fuera de estación. Los Cantaloupes se venden también a establecimientos de venta al por menor, pero una mayor proporción (especialmente de Ogens) se destinan a las empresas distribuidoras de productos preparados en el Reino Unido, la República Federal de Alemania y Suiza.

16. Se citan los precios CIF medios de los melones procedentes de distintas fuentes. En algunos países es evidente una tendencia ascendente de los precios; en otros no se evidencia ninguna tendencia. Sin embargo, los melones españoles se elevaron de precio en casi todos los países en 1973.

17. Solamente se dispone de datos de precios al por mayor en el Reino Unido. Los precios de los melones dulces son más bajos entre agosto y octubre y los de las sandías en agosto. Los precios más altos de los Cantaloupes suelen alcanzarse entre enero y mayo, cuando no se dispone de frutos israelíes y los suministros son menores.

18. Comparando los precios entre países, utilizando los precios CIF medios anuales, se muestra que en todos los países estudiados las sandías alcanzan el precio de importación más bajo, seguidas de los melones dulces; los Cantaloupes alcanzan los precios de importación más altos. Se muestra también que Suiza y la República Federal de Alemania ofrecen los majores precios FOB al exportador.

19. No pueden hacerse previsiones estadísticas referentes a la futura demanda de los diferentes tipos de melón, pero no se esperan grandes cambios en cuanto al predominio de un determinado tipo de los mismos en los distintos mercados.

20. Se muestra la existencia de grandes oportunidades para los suministradores capaces de enviar melones dulces, o en algunos países Ogens, transportados por vía aérea durante el periodo de enero a mayo. Estos frutos deben ser de alta calidad y de precio competitivo.

Introduction

Melons are very popular in most European countries and the expansion in package holidays, which has increased familiarity with the fruit, together with the fact that a melon makes an easy starter to a meal, have enhanced the popularity of this fruit. Total imports into the countries under review – the EEC countries, the UK, Sweden and Switzerland – have increased greatly in the ten years 1964–1973.

There are two main types of melon which are usually grouped together for statistical purposes, namely the watermelon (*Citrullus vulgaris*) and the musk melon (*Cucumis melo*). The latter group includes honeydew melons and all the Cantaloupes, for example, Charentais and Ogen.

There are three distinct types of melons marketed in Europe:

Honeydew melons – round or ovoid, weighing between 0.9 kg (2 lb) and 3.18 kg (7 lb) and having a greenish flesh when ripe; the skin colour may be green, yellow or white. These melons are available throughout the year from various sources and are relatively low priced.

Watermelons – a large oblong or globular fruit usually having a pale to dark green skin with a pinky-red pulp. They may weigh up to 5 kg (11 lb); these melons have a limited season and can be difficult to ship successfully; they are difficult to store and have a low price/weight ratio.

Cantaloupes – small round fruit of 0.45 to 0.90 kg (1 to 2 lb); the skin is usually yellow, or green and yellow and the flesh a rich orange colour. These melons are relatively expensive to grow and furthermore must be air-freighted to distant markets.

For further details of varieties see page 21.

Part I

Supplying countries

Production in and exports from the major supplying countries are discussed in the paragraphs below.

SPAIN

Spain is the largest exporter of melons in Europe and also one of the largest producers; her production averages around 672 000 tonnes per annum. However, since 1973 Spanish production of melons, especially honeydews, has been cut back owing to poor returns on European markets. Whether this a temporary or permanent step remains to be seen. Well over half of Spain's production consists of honeydew melons, in particular the Elche or Tendral variety, which is slightly oval in shape with a fairly thick hard, dark green, ribbed skin and a sweet yellow-green flesh. Spain also produces quite large quantities of water-melons, mainly for domestic consumption, and also small quantities of Cantaloupes, mainly of the Charentais and Tiger varieties (1).

Harvesting of melons begins in late June/early July and reaches a peak in August and September; over half of Spain's exports take place in these latter two months and of this total around 85% are of the Elche and Liso varieties. With the use of storage Spain has extended its export season for honeydew melons through the winter and into March. Small tonnages of watermelons and Cantaloupes are also exported, mainly between June and August.

Exports comprise only a small proportion of total production, but between 1964 and 1972 they showed a generally rising trend, increasing from 32 427 tonnes to 76 674 tonnes. However, in 1973, exports fell by over 20,000 tonnes-due mainly to the cutting back of the production of honeydews for export – see Table 1 of Appendix B.

The UK is the largest market for Spanish melons and, although her importance has declined over the years, in 1973 the UK still took 61% of Spain's exports. The poor returns on the UK market in relation to increased costs and the resultant drop in exports were largely responsible for the drop in total exports. Germany is the second largest market for Spanish melons, accounting for 14% of the total in 1973. Other countries to which Spain exported over 1,000 tonnes in 1973 were:– the Netherlands, France and Sweden.

Spain's exports to the eight European countries under consideration amounted to 52 747 tonnes in 1973, 95% of her total exports.

ITALY

Italy is the second largest exporter of melons in Europe and also one of the largest producers; in 1972 her watermelon production averaged 795 000 tonnes and musk

melon production over 292 000 tonnes. The production season for watermelons extends from late June/July until October, with a peak in August; musk melons are harvested between late June/July until December, a peak occurring between July and September.

It would seem that most Italian exports are of watermelons; her exports to the seven other European countries under review appear to have risen from around 15 500 tonnes in 1964 to around 58 000 tons in 1973.

Germany is the largest market for Italian exports and together with France accounted for over 80% of the total in 1973. Switzerland imported over 4 000 tonnes from Italy in 1973; smaller quantities were also consigned to the Netherlands, Belgium, Sweden and the UK.

FRANCE

French domestic production averages around 170 000 tonnes per annum. Production is largely of Cantaloupe melons, the most important being the Charentais variety, and the production season lasts from May through to September. Most French exports are composed of Charentais grown under cloches in the Vaucluse area of South-East France.

Exports rose from 2 579 tonnes in 1964 to around 9 000 tonnes in 1973. Switzerland is the largest market, taking about 50% of exports in most years although recently Belgium has been of increasing importance; other European markets include Germany, the UK and Italy.

ISRAEL

Production of watermelons in Israel averages around 100 000 tonnes while production of other melons is around 30 000 tonnes per annum. Export data for the years 1964 to 1973 are shown in Tables 2 and 3 of Appendix B; Israel exports all three types of melon.

Watermelons are shown separately from other melons and in 1964 exports totalled 680 tonnes. However, between 1965 and 1968 exports were negligible owing to a re-organisation of the Israeli watermelon industry and the war in 1967. Since 1969 exports have shown a massive increase and although a fall was recorded in 1973, exports amounted to 6 646 tonnes.

Italy, the UK, France and Germany are the main markets for Israeli watermelons, accounting for 92% of the total in 1973.

Apart from 1966 and 1967, when they were shown separately, exports of honeydew and Ogen melons were grouped together – see Table 3 of Appendix B. Exports of "other melons" were 1 432 tonnes in 1964, but in 1965 they fell to a low of 825 tonnes. Between 1966 and 1970 exports showed a gradual increase, but between 1970 and 1973 exports expanded rapidly to reach 7 285 tonnes by 1973. The large increase in the early 1970's can be largely attributed to increases in exports of honeydew melons.

In 1966 and 1967 exports of Ogen melons amounted to 756 tonnes and 811 tonnes respectively and although exports of Ogens have increased, the honeydew melon now probably accounts for well over 50% of "other melon" exports.

The UK is by far the largest market for Israeli melons, accounting for 61% of the 1973 total; other markets include Italy and Germany.

OTHER COUNTRIES

Other European suppliers include the Netherlands and Greece.

Besides Israel, the major non-European suppliers of melons are South Africa, Egypt, Chile and Morocco. South Africa and Chile supply mainly honeydew melons, Egypt – watermelons and Morocco-Cantaloupes. In addition to these suppliers there are other countries which recently have built up a regular, although in some cases fairly small, trade with Europe, eg honeydew melons have been received from Ecuador, Peru, Venezuela and Colombia; watermelons from the USA; Cantaloupes from Senegal and various Ogen-type melons, for example, from Ethiopia – the Ethiogen, from Zambia – the Zamogen, and from South Africa – the Safogen. These Cantaloupe melons are air-freighted to Europe to meet a very select specialised demand.

Suppliers south of the Equator, mainly South Africa and South American countries, have their main production and hence exporting seasons during the European winter. At this time prices are relatively high, reflecting the higher transport costs involved in importing from the Southern Hemisphere and lack of supplies from the nearer Mediterranean countries. These countries export melons between January and June, but supplies reach their peak in March to April.

Part II

Import trade

GENERAL

Imports of all types of melons into selected Western European countries are shown in Table 1. Although no accurate figures were available for Germany until 1966 and for Italy between 1968 and 1972, it can be seen from this table that total imports have risen from around 69 227 tonnes in 1964 to 165 170 tonnes in 1973, a growth rate of just over 10% per annum.

Throughout the decade the UK has been the largest market for melons, although her share of total imports has fallen progressively and was as low as 30% in 1973, due to much reduced imports. Germany is the second largest market for melons and her import levels are approaching that of the UK; in 1973 she accounted for 29% of total imports. France is a sizeable market, accounting for 17% of the total in 1973. The fastest rate of increase took place in the Netherlands and the absolute increase was greatest in Germany.

THE OUT-OF-SEASON MARKET

The out-of-season period for melons in Europe extends from November until early June, although there are supplies of cheap Spanish melons on most European markets during November and December, and it is perhaps rather inaccurate to speak of an out-of-season period in the UK, the largest import market, where commercial production is negligible. However, for the purpose of this report, the out-of-season period may be deemed to extend from November until June, ie the period during which relatively high prices are obtained for honeydew and Cantaloupe melons, and watermelons are virtually unobtainable. In Table 2, showing out-of-season imports of melons between 1963/64 and 1972/73, the periods considered were the months November to June for the UK, Germany, Switzerland, Belgium, the Netherlands and Italy, and the period 1 October to 15 June for Sweden. France was omitted from the analysis as no data were available for her in later years.

Out-of-season imports into the UK have fluctuated and show little tendency to grow, averaging 12 083 tonnes for the first five years compared with 13 348 tonnes in the last five years. Apart from 1971/72, even when total imports increased, there was no corresponding increase in the out-of-season market in the UK and although more countries are sending in the out-of-season period they are competing in a static market. In Germany the out-of-season market rose to 7,107 tonnes, in 1973, but this is still short of the UK figure. The German market has grown at a rate of 35% per annum and is expected to continue to grow, although at not such a fast rate. Out-of-season imports into the Netherlands have grown at a fast rate, especially in the last two years. The Belgian out-of-season market has also shown an increase, as has the Swiss market. The Italian out-of-season market is very large compared with total imports — this is because most

Table 1

Imports of melons into selected Western European countries 1964–1973

Tonnes

	1964	1965	1966	1967	1968	1969	1970	1971	1972	1973
United Kingdom	41 879	42 341	40 163	43 401	50 027	55 379	54 592	64 083	58 698	48 983
Federal Republic of Germany	(7 700)	(8 100)	9 647	12 403	14 396	22 601	25 607	37 304	45 261	48 461
France	10 138	9 101	12 106	13 392	14 623	17 182	18 253	21 029	24 621	28 405
Italy	1 376	2 066	2 303	1 698	3 142*	4 242*	6 499*	6 862*	8 462*	8 575
Belgium/Luxembourg	2 006	1 886	2 218	2 877	3 124	3 943	4 544	4 990	5 496	7 842
Netherlands	487	744	786	878	1 166	1 929	2 697	4 171	5 618	8 016
Switzerland	4 626	4 532	5 008	5 164	5 242	5 822	7 389	8 346	8 367	11 171
Sweden	1 015	1 137	1 399	1 515	1 887	2 636	2 490	2 916	3 231	3 720
Total	69 227	69 907	73 630	81 328	93 607	113 734	122 071	149 701	159 754	165 173

Notes: *Includes small quantities of "other fresh fruit" ( ) estimate.

Source: Official Trade Returns

Table 2

Imports of melons into selected Western European countries during the out-of-season period

Tonnes

	1963/64	1964/65	1965/66	1966/67	1967/68	1968/69	1969/70	1970/71	1971/72	1972/73
United Kingdom	11 877	11 638	14 224	9 860	12 817	13 039	13 647	11 725	17 012	11 316
Federal Republic of Germany	. . .	. . .	. . .	457	1 275	1 396	2 833	4 390	6 371	7 107
Belgium/Luxembourg	127	168	284	259	320	346	694	600	856	1 045
Italy	1 087	1 112	1 496	922	1 888	2 780	3 169	4 192	5 001	5 630
Netherlands	183	208	351	290	462	329	584	585	1 144	1 780
Switzerland	141	175	630	434	486	566	869	977	1 071	1 231
Sweden	478	506	654	735	871	1 120	1 102	1 294	1 172	1 249

. . . not available

Source: Official Trade Returns

imports arrive in Italy in June, prior to domestic production reaching a peak. Most imports in June are of watermelons. Although the Swedish out-of-season market has grown there has been little increase since 1968/60.

IMPORTS INTO INDIVIDUAL COUNTRIES

United Kingdom

The UK is the largest importer of melons of the eight European countries under consideration and imports into this country rose from 41 879 tonnes in 1964 to 64 086 tonnes in 1971. However, since then imports have fallen drastically to 48 980 tonnes in 1973 – see Table 4 of Appendix B. The very low 1973 figure was caused by much reduced exports from Spain – the largest supplier.

Throughout the ten years Spain has been the major supplier of melons to the UK, averaging over 75% of total imports in the last five years. Apart from a slight decline in 1966, imports from Spain have risen steadily from 29 273 tonnes in 1964 to 52 946 tonnes in 1971. However, in 1972 and 1973 imports from Spain fell and this depressed the total import figure. Most melons coming from Spain are honeydews, although she does send small quantities of watermelons and Cantaloupes.

By comparison with Spain, all other suppliers of melons to the UK are of relatively minor importance. Israel is the second largest supplier to this market; in 1964 she supplied 1 503 tonnes, but in the mid 1960's supplies from this source fell and reached a low of 766 tonnes in 1966, due almost entirely to a re-organisation of the Israeli melon industry and minimal exports. Supplies from Israel recovered in 1968 and since then have continued to increase, reaching over 6 000 tonnes, 1972/73. Honeydew, watermelons and Cantaloupes come from Israel, honeydews being the largest category. In 1964 Cyprus was the third largest supplier with 2 518 tonnes, but over the years her supplies have shown a gradually declining trend – Cyprus supplies mainly watermelons. Supplies from Chile fluctuated between 2 900 tonnes and 5 400 tonnes between 1964 and 1970, but since then have shown a steady downward trend. South African supplies averaged over 1 000 tonnes per annum, although they fluctuated between a low of 694 tonnes in 1966 and a peak of 1 909 tonnes in 1968.

No other country regularly sends over 1 000 tonnes per annum, but there are many small suppliers to this market eg the Netherlands, Greece, Peru, France and Italy. Unfortunately, the official import statistics provide no details of the various types of melons shipped to this market, but the market shares in 1973, 1970 and 1967 of the three main types have been estimated as follows:

	Honeydews	Watermelons	Cantaloupes	Unspecified
	Percentage			
1973	86	5	7	2
1970	90	3	4	3
1967	91	4	5	–

Spain, Chile, South Africa, Israel and Peru are the main suppliers of honeydew melons; France, the Netherlands, Israel, the Canary Islands and Morocco supply Cantaloupes and Israel, Italy, Hungary, Greece and Cyprus are the main suppliers of watermelons. There has been very little change in the relative shares of the three main types of melons on the UK market over the last six years – honeydews still predominate.

Federal Republic of Germany

Officially published Trade Returns have only been available for melons since 1966 – see Table 5 of Appendix B – when imports stood at 9 647 tonnes, although estimates in the International Trade Centre study (2) suggest that imports

in 1964 were 7 700 tonnes and 8 100 tonnes in 1965. Imports into Germany have shown a considerable increase, reaching 48 461 tonnes in 1973, a growth rate of over 25% per annum. The increases were most marked in 1969, 1971 and 1972.

Italy is the leading supplier of melons to this market, accounting for over 60% of the total in each year and her supplies to Germany have increased fivefold since 1966, reaching 34 267 tonnes in 1973. The large increase in imports from Italy has been largely responsible for the increase in total imports. Spain is the second largest supplier of melons to Germany; her suppliers have increased from 1 353 tonnes in 1966 to 5 602 tonnes in 1970, but since then they have not maintained their share of the total, imports increasing only slowly. The large increases in imports from Spain in the late 1960's were partly the results of promotional activities by one import firm in particular; the emergence of Israel as a large supplier of honeydews in the seventies has probably taken some of the Spanish trade in recent years. Israel's supplies have shown a large rise in the last two years. They are now probably dominated by honeydews whereas in 1966 they were probably of Cantaloupe melons. Greece has increased her supplies of watermelons from 173 tonnes in 1966 to 2 363 tonnes in 1973.

Other European suppliers include the Netherlands, France and Hungary. Of non-European countries, Chile and South Africa have built up a fairly steady trade with Germany, as have Peru and Ecuador latterly. Other developing countries, notably those in Latin America, are sending consignments to Germany, probably mainly honeydews, to supply the winter gap between January and May, but as yet no regular trade has emerged.

Again no division into type of melons is made in the Trade Returns, but the market shares in 1967, 1970 and 1973 of the three main types have been estimated as follows:—

	Watermelons	Honeydews	Cantaloupes	Unspecified
	Percentage			
1973	76	21	1	2
1970	74	23	3	—
1967	82	14	4	—

Italy, Hungary and Greece are the main suppliers of watermelons; Spain, Israel, South Africa and South American countries supply mainly honeydews, and France and the Netherlands Cantaloupes. Since 1967 honeydews have increased in importance, but watermelons are still by far the most popular melon in Germany. The dominance of the watermelon is probably due to the proximity of suppliers and to the tariff advantages which Greece and Italy enjoy as well as the product's basic consumer appeal.

Domestic production of melons in Germany is limited, but imports at the start of the period were relatively small for a country of her population and wealth. However, the large increases in recent years show how the fruit has been accepted and mean that Germany could well overtake the UK as the largest importer of melons in Western Europe, if recent trends continue.

France

Imports of melons have risen from 10 138 tonnes in 1964 to 28 405 tonnes in 1973; a growth rate of just over 12% per annum. Imports showed a steadily rising trend, apart from 1965 when a slight fall was recorded — see Table 6 of Appendix B.

Throughout this period Italy has been the main supplier of melons to this market; her exports showing a generally rising trend with only two exceptions, 1965 and 1968. In 1973 Italian supplies had reached 16 524 tonnes, 58% of total imports.

Spain is the second largest supplier to this market; between 1964 and 1969 supplies from this source fluctuated and showed little tendency to increase, but in 1970 they rose to over 3 000 tonnes and have continued to rise since, reaching 8 655 tonnes in 1973, 30% of the total. During the early years of the period Morocco was the only other large supplier to this market, but while total imports were on the increase supplies from Morocco showed no corresponding increase and since 1970 have been at a very low level, averaging under 500 tonnes per annum. Israel sent very small amounts in early years, but towards the end of the sixties her trade with France expanded to average 2 000 tonnes per annum in 1972/73.

No differentiation is made in the Trade Returns between types of melons imported into France, but the market shares for 1967, 1970 and 1973 of the three main types have been estimated as follows:—

	Watermelons	Honeydews	Cantaloupes	Unspecified
		Percentage		
1973	64	30	3	3
1970	71	19	10	—
1967	75	11	13	1

Italy and Israel are the major suppliers of watermelons, Spain of honeydews and Morocco and Senegal of Cantaloupes. Although watermelons are still the most popular imported melon, honeydews have increased their share of the total, while Cantaloupes have declined in importance.

Italy

Between 1968 and 1972 the Italian Trade Returns did not show imports of melons as a separate category, but grouped them with "other fresh fruit". However, it seems likely that most of the increase in imports over these five years was attributable to an increase in the melon content of this category (supporting evidence is given by the Israeli, Spanish and Greek Trade Returns).

Over the ten years imports of melons into Italy — see Table 7 of Appendix B — have risen from 1 376 tonnes to 8 575 tonnes; a growth rate of 21% per annum. Imports rose slowly from 1964 to 1966, fell in 1967, rose to over 3 000 tonnes in 1968 and to more than double this figure in 1970. Another large rise occurred in 1972.

Egypt was the main supplier of melons to Italy until 1968, but her place was then taken by Greece. Egypt's supplies fluctuated between 645 and 1 500 tons, but as total imports rose they showed no corresponding increase. Since 1968 Greece has been the major supplier of melons to Italy; her exports showed a dramatic increase in 1968, probably because she was able to take full advantage of her associate membership of the EEC. By 1973 Greek supplies had risen to 4 266 tonnes, 50% of total imports. In 1973 Israel was the second largest supplier of melons to Italy; imports from this source increased dramatically from 7 tonnes in 1968 to 2 254 tonnes in 1973, 26% of the total. Spain is the only other major supplier to Italy; imports from this source showed an increase in every year up to 1971, but since then they have fallen and were only 857 tonnes in 1973. France has also supplied this market throughout the ten year period, but she is a relatively minor supplier.

There is no breakdown given in the Trade Returns for minor suppliers, but as Italy is predominantly a market for watermelons, opportunities for distant developing countries are poor owing to the difficulties of shipping watermelons. No breakdown is given in the Italian Trade Returns of the types of melon imported, but the shares for 1973, 1970 and 1967 have been estimated as follows:—

	Watermelons	Honeydews	Cantaloupes	Unspecified
	Percentage			
1973	86	10	3	1
1970	80	16	4	–
1967	79	17	4	–

Greece, Egypt and Israel are the major suppliers of watermelons, Spain of honeydews and France of Cantaloupes. As can be seen above, demand is mainly for watermelons, with honeydews losing their share of the market.

Belgium/Luxembourg

Domestic production, mainly of hot-house melons, is small. Apart from 1965, imports of melons into Belgium have shown an increase in every year, the largest increase taking place in 1973 – see Table 8 of Appendix B. Over the ten year period imports rose from 2 006 tonnes in 1964 to 7 842 tonnes in 1973, a growth rate of about 16% per annum.

France is the leading supplier of melons to this market, accounting for 46% of the total in 1973. Imports from France increased slowly during the years 1964–1966, but in 1967, 1970 and 1973 they showed large increases to reach 3 612 tonnes in 1973. Italy is another important supplier and was the leading supplier between 1964 and 1966, but since 1966 imports from this source have shown little increase. Although no figures were available for some years, it appears that on average 1,000 tonnes per annum described as coming from "other countries" did in fact come from Italy. Thus demand for the watermelon is increasing only slightly. Spain was first shown separately as a supplier to this market in 1967 and in 1973 accounted for 20% of the total. Increased imports from France and Spain were largely responsible for the increase in total imports. The Netherlands is the only other regular European supplier.

Israel is the largest non-European supplier; trade with this country is very recent and only started in 1972. South Africa has a steady, but small market for her melons. Unfortunately, little detailed breakdown is shown in the Belgian Trade Returns so it is impossible to know which, if any, new countries are managing to find a market for their melons.

No distinction is made between types of melons imported into Belgium, but the market shares in 1973, 1970 and 1967 of the three main types have been estimated as follows:–

	Cantaloupes	Watermelons	Honeydews	Unspecified
	Percentage			
1973	48	(20)	25	(7)
1970	52	22	17	9
1967	43	37	10	10

() very approximate

France and the Netherlands are the main suppliers of Cantaloupes, Italy of watermelons and Spain of honeydews. Since 1967 Cantaloupe and honeydew melons have strengthened their hold on this market at the expense of watermelons; the absolute increase was greatest for Cantaloupes and least for watermelons.

Netherlands

Domestic production of hot-house melons has been declining in recent years, but imports have shown a substantial increase from only 487 tonnes in 1964 to 8,016 tonnes in 1973 – see Table 9 of Appendix B. Imports of melons into the Netherlands have shown the fastest growth rate of any of the eight countries studied; over 36% per annum over the ten years period. The rate of increase rose after 1968 and imports almost doubled between 1971 and 1973.

Throughout the ten year period Spain has been the leading supplier of melons to the Netherlands; her supplies showed little increase during the years 1964 to 1968 and during this time her share of the total fell from 67% in 1964 to 40% in 1968. However, since 1969 imports from Spain have shown a rising trend, accounting for 4 269 tonnes, 53% of the total, in 1973. Italy is the second largest supplier to this market, during the first four years of the period supplies from this source were under 250 tonnes; they rose in 1969, but no other large rises were recorded until 1973 when supplies more than doubled to reach 1 460 tons; 18% of the total. Hungary is another regular supplier of melons to this market. France sent over 300 tonnes to the Netherlands in 1973, an unusually high figure.

Chile is the main non-European supplier of melons, her supplies usually ranged between 100 and 200 tonnes, but in 1973 she sent 653 tonnes.

A recent development in the Dutch market has been the increase in non-European countries supplying this market; in 1970 there were only three whereas by 1973 there were at least seven. Thus while total imports increased non-European countries were able to benefit and are finding a market for good quality melons (mainly honeydews). The trade in these melons is aimed at filling the winter gap, ie January to June.

The shares of the import market in 1973, 1970 and 1967 of the three main types of melons have been estimated as follows:—

	Honeydews	Watermelons	Cantaloupes	Unspecified
	Percentage			
1973	69	21	4	6
1970	71	22	3	4
1967	71	22	7	—

Spain, Chile, Peru, Ecuador and South Africa supply honeydew melons, Italy and Hungary, watermelons, and France, Cantaloupes. Honeydew melons still dominate this market; very few Cantaloupes are imported because the Netherlands produces quite large quantities herself.

Switzerland

Imports of melons have risen from 4 626 tonnes in 1964 to 11 171 tonnes in 1973, a growth rate of just over 10% per annum. Most of the increase took place between 1969 and 1973.

In 1964 Italy was the major supplier to this market, accounting for 60% of the total, but as total imports continued to rise, supplies from Italy stabilised. However, in 1971 there was an increase in imports from this source and by 1973 supplies from Italy had reached 4 073 tonnes, 36% of the total. France became the leading supplier in 1968 and by 1973 her supplies had risen to 5 476 tonnes, 49% of the total. Spain is the other major supplier to this market; her supplies showed a steady upward trend to 1970, but since then they have levelled off and in 1973 accounted for only 9% of the total.

Israel is a regular minor supplier (as are Chile and South Africa); her supplies have shown an increase, rising to 387 tonnes in 1973. Recently, small supplies have been received from many new sources eg USA, Peru, Senegal and Ecuador, and it would appear that there are opportunities for new suppliers on this market, again mainly during the winter period.

The shares of this market in 1973, 1970 and 1967 of the three main types of melon have been estimated as follows:—

	Cantaloupes	Honeydews	Watermelons
	Percentage		
1973	52	13	35
1970	46	22	32
1967	40	14	46

France and Israel supply Cantaloupes, Spain, South Africa, Chile, Ecuador and Peru supply honeydews and Italy watermelons. Since 1967 Cantaloupes have increased their share of this market while watermelons have declined in importance. Nevertheless the demand for watermelons has remained constant in absolute terms.

There has been no increase in the demand for honeydews since 1970. Unlike most other European markets, no one type of melon really dominates the Swiss market; this is probably due in part to the mixture of basic nationalities, with the Italian Swiss favouring watermelons and the French Swiss Cantaloupes.

Sweden

There is a limited production of Cantaloupe melons under glass in Sweden, estimated at 500 tonnes per annum in the period 1968/1970 (3).

Imports of melons — see Table 11 of Appendix B — have risen from 1 015 tonnes in 1964 to 3 720 tonnes in 1973, a growth rate of over 15% per annum.

No one country really dominates this market, but throughout the ten year period Spain has been the leading supplier and accounted for over 40% of the total in the last three years. Imports from Spain showed little increase up to 1967, but from 1968 onwards they have shown an upward trend. Italy was the second largest supplier in 1973; her supplies rose from 70 tonnes in 1964 to 919 tonnes in 1973. Israeli supplies have also shown a considerable increase, from 33 tonnes in 1969 to 369 tonnes in 1973. Denmark, Chile and the Netherlands are quite important suppliers, sending regularly throughout the period. South Africa has supplied this market throughout the period with small quantities and recently other countries eg Hungary, Peru, and Ecuador have built up a regular trade with Sweden.

Although honeydew melons and Cantaloupes are shown separately for the period 16 June to 30 September from 1964 onwards, it seems probable that some honeydews and Cantaloupes are, in fact, entered under the heading 'other melons'. The approximate market shares in 1973, 1970 and 1967 of the three types would seem to be as follows:

	Honeydews	Cantaloupes	Watermelons	Unspecified
	Percentage			
1973	55	6	35	4
1970	57	18	17	8
1967	50	30	20	–

Thus between 1967 and 1973 there was a sharp fall in imports of Cantaloupe — type melons and a large increase in imports of watermelons. Honeydews are still the most popular melon on the Swedish market; their all year round availability is an important factor.

Spain, Chile, Peru, South Africa and Argentina supply honeydews, Denmark, the Netherlands and Israel supply Cantaloupes, and Italy, Israel and Hungary supply watermelons.

QUALITY REQUIREMENTS, VARIETIES ETC

Melons for European markets should be clean, free from blemish marks, damaged or bruised tissue, and well graded for size and appearance. Small to medium — sized fruit are generally favoured, for example honeydew melons between 1 and 2 kg weight (2.2–4.4 lb) and Cantaloupes between 500 g and 1 kg weight (½–1.2 lb).

It is essential that melons should arrive on the market fully mature and not hard and deficient in flavour, since the sale of immature melons can seriously prejudice the average consumer against the fruit.

Common standards of quality for melons have not been implemented under present EEC legislation. However, there does exist a European standard for watermelons, recommended by the working party for the Economic Commission for Europe and this may be used for guidance by producers supplying the EEC (see Appendix C).

This standard provides for two quality classes and four weight grades, the minimum permitted weight being 1.5 kg (3.3 lb).

The following are the main varieties of the three types of melon sold on the European market:

Honeydew melons

Elche or Tendral — the best known honeydew melon. An oval melon having a thick, ribbed, dark green or yellow skin and a sweet greenish/yellow flesh. This variety has good storage properties and the green honeydew can be stored from 2–6 months. Spain is the major exporter of this type of melon.

Liso — an oval melon with a green/yellow skin, pale yellow flesh and a sweet taste. This is an early variety with poor keeping qualities and is exported mainly by Spain.

White honeydew melons — these are round and smooth-skinned. They are chiefly exported from South American countries and South Africa.

Generally speaking, the dark-green honeydew melons are preferred by European consumers, although consumers in the United Kingdom and Sweden seem to have a preference for the yellow-skinned honeydew. White-skinned honeydew melons are not as popular mainly because, being white, they are regarded as being less attractive.

Watermelons

Many varieties of watermelons are sold on European markets, including Sugar Baby, Chilean Black and Calabar. In general, dark green skinned varieties with a high sugar content are preferred and the flesh should be a deep orange-red colour. The contrasting colours of skin and flesh give the fruit considerable eye appeal which is important as the fruit is often sold as portions of the whole.

Cantaloupe melons

Charentais — a small round fruit with a smooth grey-green skin and orange flesh, having an outstanding flavour. The Charentais originated in the Charente valley of South-East France and is chiefly grown there and in the Vaucluse area of France. Spain, Morocco and Senegal also export the Charentais melon.

Ogen — rather larger than the Charentais, with a smooth skin striped green and yellowish/green having a greenish flesh with a pink tinge. This melon originated in Israel and has been exported by air from that country since 1957. Such is the popularity of the Ogen that many countries have tried to produce this type of melon and South Africa and Zambia are among the countries successfully exporting an Ogen-type melon.

'Tigers' and Nets — are other varieties of Cantaloupe melons, chiefly produced in the Netherlands. The 'Net' melons are almost spherical with a raised net-like pattern of greyish coloured veins over the surface.

Ogen melons are one of the most expensive types of melons to market because of their high degree of perishability (and hence the need to air-freight) combined

with high costs for production, especially when grown under plastic, as in Israel. In the South of France melons are grown under cloches which are removed for final ripening in the open. In the Netherlands Cantaloupe melons are grown in heated glass-houses, production beginning as early as May. Swedish production is also all under glass.

HARVESTING, PACKING AND HANDLING

Melons for export should be harvested at the correct stage of maturity for them to have satisfactory transportation and storage properties together with an adequate shelf life. Sugar content, colour, appearance of skin, shape, degree of ridging and condition of the stem are factors which may be used to indicate the correct stage of maturity for harvesting.

The fruit should be moved to the shade as soon as possible after picking. Pre-cooling, particularly of Cantaloupe types, extends the shelf life of the fruit and the initial reduction of temperature to 10°–16°C (50°–60°F) is the most critical.

Melons for European markets should be accurately size-graded as this improves the appearance of the pack and aids packaging. Also where melons are sold per piece, eg as in the UK, the retailer is more easily able to assess the selling price.

Various types and sizes of container are used in the trade. Spanish honeydews are mainly packed in 10 kg (22 lb) wooden trays with cardboard liners or wood-wool to protect the fruit. South American suppliers use both wood and fibre-board cartons with weights ranging from 10 to 15 kg (22–33 lb), depending on the source of supply. These containers usually have cardboard dividers. Honey-dews from Israel are usually packed in 10–12 kg (22–25 lb) fibreboard cartons. There has been a general trend towards the use of smaller containers, one reason being that they are more easily handled by female shop assistants.

French Charentais are packed in open top wooden trays of about 7 kg (15 lb) capacity, the fruit supported by a layer of wood-wool with coloured paper between the melons. They may also be gift packed in individual fibreboard containers and placed in wooden trays. Ogens are packed in 5 kg (11 lb) fibre-board cartons with wood-wool protecting the melons. There are developments taking place in relation to melon packaging, particularly with regard to the type of protective material used inside the container.

Watermelons are usually packed in fibreboard cartons with cardboard divisions between the melons.

Cantaloupe melons are easily damaged and have a relatively short shelf-life so that air-freighting from sources outside Europe is generally essential. The Canary Islands' exporters, however, use fast refrigerated ships in addition to air transport.

Watermelons are particularly difficult to transport successfully on account of their size and liability to mechanical injury during the journey. However, careful packing can help to overcome this problem and watermelons are now regularly shipped from the USA to the UK. The low price/weight ratio of watermelons has discouraged the use of air-freight.

A feature of the melon trade in recent years has been the considerable increase in the packing of fruit under brand names, with each fruit labelled so that it can be easily recognised by the purchaser. This development may well have stimu-lated sales, especially since many of the exporters using a brand label have achieved a reputation for the reliability of the quality of their fruit.

BARRIERS TO TRADE

Import tariffs

Tariffs levied on melons imported into the European countries surveyed in this report were as follows on 1 January 1975:

	Period	General Rate	Exceptions
United Kingdom	All year	7.4% *ad valorem*	EEC countries 3% Non-preferential Commonwealth countries 4.4% ACP/Lomé countries Free *
EEC (six original members)	All year	11% *ad valorem*	ACP/Lomé countries Free *
Switzerland	All year	10 Fr/100 kg gross	—
Sweden	16 June to 30 September	40 Kr/100 kg	—
	1 October to 15 June	Free	

*As from 1.7.75

The UK tariff is being aligned with the EEC tariff over five years and by 1 January 1978 the tariffs will be harmonised. (Before entry into the EEC the UK tariff was 5% *ad valorem*). An agreement has been signed between the enlarged EEC and the ACP (African, Caribbean and Pacific) countries — the Lomé Convention — covering trade in a variety of commodities. Under this Convention, melons are imported free into the EEC from ACP countries, but this is expected to have only a marginal effect on trade patterns as the ACP countries are not major producers of melons.

Suppliers to the EEC, other than members of the Lomé Convention, face quite high tariff barriers as there is no tariff reduction under GSP for developing countries, although the high import tariff has not prevented a substantial growth in imports from countries such as Spain. However, as part of her global Mediterranean policy, the EEC has signed an agreement with Israel covering, among other things, the import of melons. As from 1 July 1975 imports of watermelons into the EEC from Israel qualify for a 50% duty reduction between 1 April and 30 June and 'other melons' for a 50% duty reduction between 1 November and 31 May. It is the intention of the EEC to negotiate similar agreements with her other Mediterranean suppliers and similar tariff concessions may be expected.

On an ad valorem basis the summer Swedish tariff is the highest; it was approximately 28% of the summer all source price in 1973 and is a protective measure for the domestic industry.

At this point it is appropriate to discuss the implications of UK entry into the EEC.

(1) The number of countries having freedom of entry to the UK market will change: developing Commonwealth countries which are signatories to the Lomé Agreement will continue to enjoy free access to the UK market, but they will be joined by non-Commonwealth developing countries in this group. South Africa and Cyprus will be the only significant suppliers to lose this concession although the latter may gain some concessions from bi-lateral negotiations with the EEC.

(2) Developing Commonwealth ACP countries will join non-Commonwealth ACP countries in enjoying duty free entry in the six original EEC countries.

(3) In 1972 some 97% of the UK's imports of melons came from dutiable sources, including 2% from EEC countries; the balance of 3% came from South Africa and Cyprus. Since well over 90% of traditional supplies will still be dutiable the ultimate increase in duty of 6% will be borne by all major suppliers. However, it is thought unlikely, in view of the phasing of the increase and general inflationary trends, that this increase will be sufficiently large to have a significant adverse influence on imports overall.

(4) Present members of the EEC and non-Commonwealth ACP countries will have free entry into the UK, but this is not expected to have much effect on imports because of the very small share concerned and the type of melon likely to come from such sources. However, Italy's share of the watermelon trade may increase, and imports of Charentais melons from the Netherlands and France may also increase.

(5) The Commonwealth countries which have signed the Lomé Convention will derive an advantage on the Six's markets, but this appears to have little practical significance in view of the very limited demand in the EEC for the type of melon which these developing countries could produce and market.

(6) No major change is seen in sources of supply of honeydew melons, but as Israel has negotiated a tariff reduction there may be some increase in supplies from this source at the expense of Spain. Of the Southern Hemisphere suppliers, South Africa will lose her tariff preference, but she will still have a geographical advantage over her South American competitors and should still be able to supply out-of-season honeydews to the UK.

(7) During July and August there could be a change in the source of supply of watermelons to the UK as Italian and Greek exporters will derive a tariff advantage over Cypriot and Israeli exporters. Before July Israeli exports will only have to pay 50% of the tariff and as European supplies are only just starting she could derive considerable advantage in the EEC.

(8) Some change may occur in the sources of supply of Cantaloupes to the UK. During the summer, imports into the UK from France and the Netherlands could increase, but the Israelis should still have a good market as the British do not as yet regard melons such as the Charentais as substitutes for the Israeli Ogen. Sources of supply during the winter months are not expected to show much change.

(9) Taken overall the UK's entry into the EEC is likely to have only a very marginal effect on the trade in melons and is not expected to change significantly the relative proportions of different types of melons on this market.

Phyto-sanitary regulations

There are no phyto-sanitary regulations specific to melons in the countries under review. However, to comply with the French and Swedish regulations, melons consigned from a country infested with San Jose tick must be free from this pest and accompanied by a phyto-sanitary certificate to this effect. Melons imported into Germany must be free of certain chemical residues. (4)

THE MARKET SITUATION IN INDIVIDUAL COUNTRIES IN WESTERN EUROPE

United Kingdom

Seasonality. Around 50% of total imports arrive in August and September; August is usually the peak month for imports. These figures are lower than in most other European countries as the UK tends to have a slightly more even distribution of imports. Most of the fall in imports in 1973 occurred in September. Imports are usually over 5 000 tonnes in October and from November to May are not usually more than 2 000 tonnes a month. There is a large rise in imports in June/July, prior to the August peak.

Spain is the major supplier to this market; the Spanish export season lasts from June to March and around 85% of Spanish exports arrive during the four months July to October. Melons from Chile arrive from March to June and supplies from Israel arrive from May to December with a peak in June and July. Melons from South Africa, Peru and the Netherlands arrive in the first half of the year while those from Cyprus arrive from June to October.

The wholesale price series — see Tables 4, 5 and 6 — are useful indicators of the seasonal distribution of the three types of melon. Table 4 shows that from January to May supplies of honeydews (apart from those from Spain) come from countries in the Southern Hemisphere whereas from July onwards this market is exclusively supplied by countries in the Northern Hemisphere. Table 5 shows that South Africa and Zambia are filling the gap in supplies of Cantaloupes between January and April. Table 6 shows that the season for watermelons is largely limited to the months June to October.

Distribution. Most melons imported into the UK come by sea and rail, but Ogen melons are usually air-freighted. During the summer and autumn honeydew melons are widely distributed through retail outlets — fruiterers/greengrocers, supermarkets and in some instances street markets, the last named particularly if there have been delays in arrival or distribution problems and the market is temporarily oversupplied. The main outlets for the higher priced winter produce are the more exclusive hoteliers and restaurateurs. Watermelons also go to both retail and catering outlets; they are not as widely distributed as honeydews though they are increasingly encountered, but they are particularly sought by certain sectors of the immigrant population. Charentais and other European-grown Cantaloupes are retailed at the peak of their production season, but the catering industry probably comprises the major outlet. Ogen melons go chiefly to the catering industry although some are sold at retail.

All initial importation is done on a consignment basis, the importer selling on commission.

Supermarkets handle all types of melon although sales are concentrated on honeydew and watermelons. They may buy direct from source, but usually purchase the fruit through a market firm on a pre-determined basis, ie the buyers do not personally attend the markets daily.

Retail outlets, particularly supermarkets, offer halves and segments of watermelons, honeydews and occasionally Cantaloupes, particularly when prices are high; the segments are wrapped in cellophane and priced individually. This selling of cut melons helps to increase sales overall since many housewives would not buy the whole fruit, particularly the watermelon.

Prices. Average annual cif prices for melons imported into the United Kingdom are shown in Table 3.

Apart from 1971 all source prices showed a rising trend, the largest increase taking place in 1973. These rising prices reflect the declining value of sterling on the markets. Spanish melons showed a similar trend to the all source price (as might be expected); their cif value also showed a large rise in 1973. Chilean melons have shown an increase in price as imports fall and by 1973 had reached over 16p/kg, compared with only 6p/kg in 1969. Apart from 1972 when their price fell, Israeli melons fetched a fairly steady price — around 19—20p/kg. Israeli melons are high priced on this market owing to the relatively high proportion of Ogens imported. Prices for South African melons showed little movement until 1972/73 when they rose by 8p/kg in two years. Dutch Cantaloupes also fetched a steady price until 1972 when they rose in price by a third over the 1971 figure. A similar pattern was shown for French melons. Italian melons are the lowest priced on this market and have shown no increase in price over the years. There was a large rise in the price for Cypriot melons in 1972 and 1973; the reason for this is not known.

Table 3

Average cif prices for melons imported into the United Kingdom, 1969–1973

p/kg

	1969	1970	1971	1972	1973
All sources	7.28	8.16	7.97	9.16	12.53
Spain	6.65	7.44	6.81	7.86	10.15
Chile	6.05	8.22	9.28	12.76	16.22
Israel	19.82	19.93	20.35	14.72	20.81
Cyprus	6.79	9.49	8.55	12.86	20.00
Republic of South Africa	10.47	10.27	10.41	14.25	18.65
Netherlands	14.83	14.12	15.25	20.64	21.31
Italy	6.65	5.76	7.48	6.72	7.11
France	12.16	12.53	12.91	19.82	18.67

Source: Derived from Official Trade Returns

Monthly average wholesale prices at Covent Garden for honeydews, Cantaloupes and watermelons for the years 1969 to 1974 are given in Tables 4, 5 and 6; the prices are shown per container since this is the form in which the trade handles this commodity and the weight of the container may vary from that shown depending on the size of the melons packed.

Table 4 shows that wholesale prices of honeydew melons are lowest during the months August to October when Spanish supplies are in full flow. In June and July, before Spanish supplies reach a peak, prices are higher, Israeli melons making very good prices in June. Prices paid for melons arriving between January and May are on average higher than for other months of the year, but there is no one month with particularly high prices. It is interesting to note that more countries, notably Colombia, have been sending honeydew melons to the UK in the out-of-season period. Over the years there has been a tendency for wholesale prices to rise, reflecting increased production and marketing costs.

Apart from African suppliers, the highest wholesale prices for Cantaloupes – see Table 5 – are recorded at the beginning of the season in each producing country, but as supplies increase prices fall. Israeli Ogens fetch high wholesale prices throughout the year, even during the summer months. Canary Ogens fetch lower prices than Israeli Ogens, probably because of lower transport costs; they are sea-freighted whereas Israeli Ogens come by air. Charentais melons from France fetch high prices at the start of their export season as do melons from the Netherlands, but by August prices have fallen. Ogens from African countries fetch by far the highest import prices as they arrive at a time when supplies are very low. This trade has only emerged in the last three years and three countries – South Africa, Zambia and Ethiopia – are sending regular supplies of Ogen-type melons.

Wholesale prices for watermelons (see Table 6) are lowest in August, when supplies are greatest. As with other types of melon new suppliers have been emerging eg the USA, who sent over 200 tonnes by sea in 1973, and occasional supplies from Colombia (by sea) and Ethiopia (by air). Thus there are irregular supplies of watermelons on the market before June. Unfortunately prices are only available for Ethiopian watermelons.

Federal Republic of Germany

Seasonality On average, over 75% of total annual imports into Germany arrived in July and August in the years 1971–1973, and virtually all the increase in imports noted in recent years occurred in the months June to September. Imports fall sharply from August onwards and between December and April average under 200 tonnes per month. Imports start to increase again in May and June.

Table 4

Honeydew melons – average wholesale prices at Covent Garden Market, 1969–1974

New pence

		Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Annual Range Low	Annual Range High
Spain	1969	194	150 (b)	–	–	–	–	–	75 (a)	76	76	79	94	75	194
Green	1970	117	144	155 (a)	–	–	–	–	–	86	85½	124	134	85½	155
10 kg	1971	191	214	–	–	–	–	–	–	80	64	79	87	64	214
	1972	147	86	–	–	–	–	–	–	92	85	172	184	85	184
	1973	–	–	–	–	–	–	–	–	141½	122½	165	223	122½	223
	1974	–	–	–	–	–	–	–							
Spain	1969	–	–	–	–	–	165 (b)	95	75	69	81½	92½(b)	–	69	165
Yellow	1970	–	–	–	–	–	172½(b)	106½	74	81	107	115(b)	–	74	172½
10 kg	1971	–	–	–	–	–	–	130	74	73	66	95	85 (a)	66	130
	1972	–	–	–	–	–	–	102	110½	83	89	131½	155 (a)	83	155
	1973	–	–	–	–	–	140 (a)	160 (b)	108½	135	142½	160 (a)	–	108½	160
	1974	–	–	–	–	–	–	221							
Israel	1969	–	–	–	–	–	259 (b)	154 (b)	129 (b)	–	–	–	–	129	259
Yellow	1970	–	–	–	–	–	269 (b)	161 (b)	–	–	–	–	–	161	269
10 kg	1971	–	–	–	–	–	202	–	–	–	–	–	–	202	
	1972	–	–	–	–	–	–	100	–	–	–	–	–	100	
	1973	–	–	–	–	400 (a)	228	167½(b)	–	–	–	–	–	167½	400
	1974	–	–	–	–	–	369	225	–	–	–	–	–	225	369
South Africa	1969	–	151	139	–	–	–	–	–	–	–	–	–	139	151
Green	1970	–	160 (b)	136½(b)	132½(b)	–	–	–	–	–	–	–	–	132½	160
12 kg	1971	–	198	162	–	–	–	–	–	–	–	–	–	162	198
	1972	–	125	133	375 (a)	–	–	–	–	–	–	–	–	125	375
	1973	–	212	200	–	–	–	–	–	–	–	–	–	200	212
	1974	–	–	201½	–	–	–	–	–	–	–	–	–	201½	
South Africa	1969	142 (a)	126	110	145 (a)	–	–	–	–	–	–	–	–	110	145
White	1970	–	121½	102½	–	–	–	–	–	–	–	–	–	102½	121½
12 kg	1971	200 (b)	155	145 (b)	–	–	–	–	–	–	–	–	–	145 (b)	200
	1972	–	125	166½	251	–	–	–	–	–	–	–	–	125	251
	1973	245	207½	214	206	157½(b)	–	–	–	–	–	–	–	157½	245
	1974	175	181½	164	186	215	–	–	–	–	–	–	–	164	215

Table 4 (*continued*)

New pence

		Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Annual Range Low	Annual Range High
Chile	1969	–	–	187½	168	–	–	–	–	–	–	–	–	168	187½
Green	1970	–	–	151	238½	171	–	–	–	–	–	–	–	151	238½
15 kg	1971	–	–	210 (b)	287	–	–	–	–	–	–	–	–	210	287
	1972	–	–	–	412½(a)	–	–	–	–	–	–	–	–	412½	
	1973	–	–	–	–	335	300 (a)	–	–	–	–	–	–	300	335
Chile	1969	–	–	–	139	165	–	–	–	–	–	–	–	139	165
White	1970	–	–	146½(b)	227½	181½	–	–	–	–	–	–	–	146½	227½
15 kg	1971	–	–	190 (b)	202 (b)	360 (b)	–	–	–	–	–	–	–	190	360
	1972	–	–	253½(b)	305 (b)	–	475 (b)	–	–	–	–	–	–	253½	475
	1973	–	–	400 (a)	297½(b)	285 (a)	–	–	–	–	–	–	–	285	400
Peru	1969	224 (b)	196 (b)	187½	–	–	–	–	–	–	–	–	–	187½	224
White	1971	247 (b)	214	–	–	–	–	–	–	–	–	–	–	214	247
15 kg	1972	–	–	230 (b)	–	–	450 (a)	–	–	–	–	–	–	230	450
	1973	–	200 (a)	–	–	–	–	–	–	–	–	–	–	200	
Peru	1969	264 (b)	243	–	–	–	–	–	–	–	–	–	–	243	264
Green	1972	–	–	257	–	–	–	–	–	–	–	–	–	257	
15 kg	1973	412½(b)	–	300 (a)	–	–	–	–	–	–	–	–	–	300	412½
Colombia	1973	–	250 (a)	220	–	–	–	–	–	–	–	–	–	220	250
White	1974	212½(b)	–	–	–	–	–	–	–	–	–	–	–	212½	
15 kg															
Colombia	1973	–	325 (a)	280 (a)	245 (b)	–	–	–	–	–	–	–	–	245	325
Yellow	1974	232½(b)	244	255	239	230 (a)	–	–	–	–	–	–	–	230	255
15 kg															
Colombia	1973	–	300 (a)	280 (a)	255	287½(b)	–	–	–	–	–	–	–	255	300
Green	1974	–	241½	221½	304	343½(b)	–	–	–	–	–	–	–	221½	343½
15 kg															

Notes: – no price quoted
(a) price quoted only once in the month
(b) price quoted twice in the month

Source: *Fruit Trades Journal*

Table 5

Cantaloupe melons — average wholesale prices at Covent Gardens Market, 1969–1974

New pence

		Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Annual Range Low	Annual Range High
Israel	1969	–	–	–	–	262½	252	164	144	204	140	171½	135 (a)	135	262½
Ogen	1970	–	–	–	–	249	193	169	170½	194	174	200	150 (a)	150	249
5 kg	1971	–	–	–	–	300 (b)	206	168	142	172	177	208	130	130	300
	1972	225 (a)	–	–	342½(b)	356	224½	200	172½	181½	205	244	259	172½	356
	1973	–	–	–	475 (b)	305	266	220	208½	195	254	337	296	195	475
	1974	–	–	425 (b)	–	261	322½	224							
Canary Islands	1969	–	–	–	208	154	–	90	–	–	120 (a)	–	–	90	208
Ogen	1970	–	–	212½	229	159	132½(b)	81 (b)	–	–	–	–	–	81	229
5 kg	1971	–	–	258 (a)	222	187 (b)	176 (b)	–	–	–	–	–	–	176	258
	1972	–	–	312½(a)	–	268½(b)	275 (a)	–	–	–	–	–	–	268½	312½
	1973	–	–	–	312½(b)	175 (b)	275 (a)	–	–	–	–	–	–	175	312½
	1974	–	–	–	–	–	257½(b)	225 (a)							
France	1969	–	–	–	–	–	288½	225	150	91½	–	–	–	91½	288½
Charentais	1970	–	–	–	–	–	247½(b)	183½	92½	–	–	–	–	92½	247½
7 kg	1971	–	–	–	–	–	298 (b)	147 (b)	151 (b)	112 (a)	–	–	–	112	298
	1972	–	–	–	–	–	–	213	129	110½	–	–	–	110½	213
	1973	–	–	–	–	–	375 (a)	177½(a)	128	–	–	–	–	128	375
	1974	–	–	–	–	–	–	240							
Spain	1969	–	–	–	–	–	177½(b)	119 (b)	–	–	–	–	–	119	177½
Charentais	1970	–	–	–	–	–	125 (a)	93½	–	–	–	–	–	93½	125
6 kg	1972	–	–	–	–	–	–	95 (a)	–	–	–	–	–	95	
	1973	–	–	–	–	–	225 (a)	177½(b)	–	–	–	–	–	177½	225
	1974	–	–	–	–	355 (b)	330	227	–	–	–	–	–	227	355
Ethiopia	1972	380 (a)	–	–	483½	325 (a)	–	–	–	–	–	–	–	325	483½
Ogen	1973	–	–	350 (b)	475 (a)	333½	–	–	–	–	–	–	–	333½	475
5 kg	1974	–	–	–	716½	600 (a)	–	–	–	–	–	–	–	600	716½
Zambia	1972	331	344 (b)	395	487½(b)	–	–	–	–	–	–	–	–	331	487½
Ogen	1973	445½	425 (a)	352½	491½	–	–	–	–	–	–	–	–	352½	491½
5 kg	1974	441½	446½	450 (a)	–	–	–	–	–	–	–	–	–	441½	450
South Africa	1972	–	362½(a)	350 (a)	–	–	–	–	–	–	–	–	325 (a)	325	362½
Ogen	1973	296½	272½	350	475 (a)	–	–	–	–	–	–	–	325 (a)	272½	475
5 kg	1974	412½(b)	325	525 (a)	–	–	–	–	–	–	–	–			

Notes: – no price quoted

(a) price quoted only once in the month

(b) price quoted twice in the month

Source: *Fruit Trades Journal.*

Table 6

Watermelons — average wholesale prices at Covent Garden Market, 1969–1974

New pence

		Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Annual Range Low	Annual Range High
Cyprus	1969	—	—	—	127½(a)	—	250 (a)	189	138½	110½	142½(b)	—	—	110½	250
20 kg	1970	—	—	—	—	—	215 (b)	201	146	—	225 (a)	—	—	146	225
	1971	—	—	—	—	—	220 (a)	156	151	120	—	—	—	120	220
	1972	—	—	—	—	—	191	—							
Italy	1969	—	—	—	115 (a)	—	—	—	115½	115 (b)	—	—	—	115	115½
15 kg	1970	—	—	—	—	—	—	—	112½(b)	—	—	—	—		112½
	1971	—	—	—	—	—	—	—	100	—	—	—	—		100
	1973	—	—	—	—	—	—	—	137½(b)	—	—	—	—		137½
	1974	—	—	—	—	—	—	210 (a)							
Israel	1969	—	—	—	—	—	250 (a)	—	102½	—	—	—	—	102½	250
15 kg	1970	—	—	—	—	—	164 (b)	169	—	—	—	—	—	164	169
	1971	—	—	—	—	—	235	162	—	—	—	—	—	162	235
	1972	—	—	—	—	—	—	116½	—	—	—	—	—		116½
	1973	—	—	—	—	325 (a)	264	140 (b)	—	—	—	—	—	140	325
	1974	—	—	—	—	—	—	175 (b)							
Spain	1969	—	—	—	—	—	—	105 (a)	98½	95 (a)	—	—	—	95	105
15 kg	1971	—	—	—	—	—	—	106 (b)	105	85 (a)	—	—	—	85	106
	1972	—	—	—	—	—	—	105 (b)	123	142	—	—	—	105	142
	1973	—	—	—	—	—	200 (b)	100 (a)	118	134	—	—	—	100	200
	1974	—	—	—	—	—	238	137							
Greece	1969	—	—	—	—	—	—	142½(a)	102½(a)	—	—	—	—	102½	142½
20 kg	1971	—	—	—	—	—	—	80 (a)	—	—	—	—	—		80
	1972	—	—	—	—	—	—	121 (b)	—	—	—	—	—		121
Hungary	1969	—	—	—	—	—	—	—	122½	—	—	—	—		122½
15 kg	1970	—	—	—	—	—	—	—	105 (b)	—	—	—	—		105
	1971	—	—	—	—	—	—	—	138	110 (a)	—	—	—	110	138
	1972	—	—	—	—	—	—	—	150 (a)	—	—	—	—		150
	1973	—	—	—	—	—	—	—	155 (a)	210 (a)	—	—	—	155	210
Turkey	1972	—	—	—	—	—	—	135 (a)	—	145 (b)	—	—	—	135	145
20 kg	1973	—	—	—	—	—	—	—	—	195 (b)	185 (a)	—	—	185	195
Ethiopia	1973	—	—	—	—	375 (a)	—	—	—	—	—	—	—		375
15 kg	1974	—	—	—	362½(b)	305 (a)	—	—	—	—	—	—	—	305	362½

Notes: — no price quoted
(a) price quoted only one week in the month
(b) price quoted only twice in the month

Source: *Fruit Trades Journal*

Italian melons are on the market from June to October (and occasionally through to December), but around 85% of Italian supplies arrive in Germany in July and August. Most of Spain's exports arrive in July and August, but over the years she has extended her export season to run from June to as late as February in some years. Greece supplies this market between June and August and Hungary mainly in August. Israel supplies melons from May to December, with a peak in June, Chile between March and June and South Africa between February and April.

Summing up, most Mediterranean/European supplies arrive between June and December and Southern Hemisphere supplies between January and May.

All three types of melon are on the market during the summer peak, but during the winter months honeydews from Spain, South Africa and South America dominate this market.

Distribution European-grown melons and Israeli honeydew and watermelons arrive in Germany by rail (in the case of the latter having been shipped to Marseilles); South American and South African melons arrive by sea at Hamburg and Bremerhaven and Israeli Ogens are sent by air to Frankfurt.

Air-freighted Cantaloupes probably go to high class restaurants, hotels and exclusive retailers whereas watermelons and honeydews are widely sold throughout Germany. Advertising campaigns have mainly been responsible for the large increase in imports since 1968 and Germans are now much better acquainted with this fruit.

Prices Average annual cif prices for melons imported into Germany are shown below.

Table 7

Average cif prices for melons imported into the Federal Republic of Germany, 1969–1973

DM/kg

	1969	1970	1971	1972	1973
All sources	0.58	0.55	0.57	0.56	0.57
Italy	0.50	0.48	0.48	0.42	0.42
Spain	0.76	0.59	0.76	0.77	0.83
Chile	1.14	0.86	1.15	1.98	1.93
Israel	2.39	2.32	1.51	1.24	1.30
France	1.82	1.44	1.35	1.59	1.44
Netherlands	2.07	1.92	2.17	2.30	2.06
South Africa	1.51	0.98	...	1.67	1.79

. . . no price quoted

Source: Derived from Official Trade Returns

Table 7 shows that there has been little overall movement in the average import price despite the large increase in imports. This suggests unsatisfied demand for this fruit, but in addition the currency has been very strong and the revaluation in 1969 led to an overall fall in all import prices in 1970.

Italian watermelons fetch by far the lowest import price, under 0.50 DM/kg, followed by Spanish melons which also fetch under 1 DM/kg. Honeydew melons from the Southern Hemisphere fetch between 1 DM/kg and 2 DM/kg on account of their high marketing costs. French Cantaloupes and Israeli melons also fall into this price range; the fall in price for Israeli melons was brought about by the increasing share of cheaper priced honeydew melons in the total. Dutch Cantaloupes are the highest priced melons on this market.

France

Seasonality Unfortunately there are no seasonal import figures available for France although it seems probable that, in common with other European countries, her imports of melons reach a peak during July, August and September. Italy and Spain would be the main suppliers in these months while supplies from Morocco would probably arrive between April and June. Israeli supplies probably reach a peak in June/July. It would appear that imports are very small during the winter months.

Distribution Fruit from Italy and Spain arrives by rail and a large part of this fruit is probably sold in the South of France. Melons from Morocco and Israel are shipped to Marseilles. Out-of-season Cantaloupes, eg from Israel and Senegal, arrive by air. Most of this air-freighted fruit goes to the catering trade and demand for it is limited, although in recent years Senegal has been sending increasing quantities.

Prices Table 8 shows average cif values of imported melons during the last five years.

Table 8

Average cif prices of melons imported into France, 1969–1973

Fr/kg

	1969	1970	1971	1972	1973
All sources	0.59	0.61	0.53	0.59	0.81
Italy	0.51	0.52	0.47	0.51	0.54
Morocco	1.00	1.03	1.09	0.91	1.82
Spain	0.69	0.65	0.52	0.56	0.88
Israel	1.58	1.27	1.13	0.99	1.29
Senegal	3.09	–	5.78	4.22	3.97

– no price quoted

Source: Derived from Official Trade Returns

All source prices rose considerably in 1973, due largely to rises in the prices paid for Moroccan, Spanish and Israeli melons. Italian melons fetch a fairly steady import price, usually just over 0.50 Fr/kg. Prices for Moroccan melons were fairly static until 1973, when the 1972 price doubled. Israeli melons showed a downward trend in price 1969–1972, but in 1973 prices rose. The high price paid for Senegalese melons illustrates the premium that is paid for good quality air-freighted Cantaloupes.

Italy

Seasonality Imported melons arrive mainly in June and July – the main suppliers being Greece, Egypt and Israel – before Italian melon production reaches its peak in July/August. Imports are very low in August, but build up again to a slight peak in December. From January to April imports of melons are very low before building up in May prior to the peak months of June/July. Egypt and Israel supply small quantities between August and December while Spain's supplies come mainly between September and April.

Watermelons are imported into Italy in June and July, honeydews from September through to March and Cantaloupes are probably imported in the summer/autumn months.

Distribution Although imports have increased considerably, they still form a very minor proportion of the total tonnage of melons sold in Italy and it seems likely

that the main markets for imported melons are the large urban centres in Northern Italy, notably Milan.

Prices Table 9 below shows the average cif value of melons imported into Italy over the last five years.

Table 9

Average cif value of melons imported into Italy, 1969–1973

Lire/kg

	1969	1970	1971	1972	1973
All sources	118	120	128	134	186
France	479	505	557	637	728
Spain	96	98	102	148	221
Greece	92	102	104	96	155
Egypt	141	130	150	190	244
Israel	157	116	127	111	147

Source: Derived from Official Trade Returns

Average all source import prices have shown a rising trend with a large increase occurring in 1973; as with the UK, Italy's currency has been weak and this has contributed to rising import prices. French Cantaloupes fetch the highest import price – approximately three times as high as for other melons. Greek watermelons fetch a low price on the Italian market, as do Israeli melons – these are also probably watermelons. Spanish melons have shown a considerable increase in price, as have Egyptian watermelons.

Belgium/Luxembourg

Seasonality Imports are greatest between July and September, with 80% of total imports arriving in these three months. Imports fall off in October and from November to May are under 100 tonnes a month. Imports start to build up in June, prior to the summer peak.

France exports to this market all the year round, but most of her supplies arrive between June and September. Supplies arrive from Italy during June/July and continue, although dropping off greatly after August, to the end of the year. Spanish melons are on this market between July and October. South African melons arrive in February/March.

Cantaloupes, watermelons and honeydews are all on this market in the summer peak; supplies in the spring are mainly of honeydew melons from countries south of the Equator. Some Cantaloupes and honeydews are imported in the winter months.

Distribution Sales of melons are carried out mainly in wholesale markets, but there are still, particularly in provincial towns, fruit traders who import direct from growers, or in some cases from the Paris wholesale market, by-passing the Belgian markets. Melons from France, Italy and Spain are imported by rail and sold through a wide range of retail outlets. Honeydews from South Africa arrive by sea.

Charentais melons are generally preferred by the Belgians – domestic production is of this type of melon – but watermelons are also imported and honeydews are increasing in popularity.

Prices The average cif values of melons imported into Belgium over the last five years were as follows:–

Table 10

Average cif prices of melons imported into Belgium/Luxembourg, 1969–1973

B.Fr/kg

	1969	1970	1971	1972	1973
All sources	9.43	11.64	12.44	13.45	13.32
France	11.66	12.83	17.05	20.97	18.72
Italy	6.33	...	6.48	...	...
Spain	11.49	14.31	...	10.66	9.06
Israel	...	...	...	13.90	12.03
South Africa	16.73	20.69	21.33	18.96	15.70

... no price available

Source: Derived from Official Trade Returns

Annual all source prices showed an upward trend between 1969 and 1972, but the 1973 price fell slightly. French melons fetch above the all source price and have shown a similar trend – these melons are fairly high priced compared with most other suppliers. The high price for French Charentais demonstrates the preference for this melon in Belgium. Prices for Spanish melons have tended to fall as imports have risen and South African prices have shown no definite trend. As on other markets, Italian watermelons fetch the lowest import price.

Netherlands

Seasonality August is the peak month for imports, followed by September, and in 1973, by July. Over the years imports arriving between November and June have shown an increase, although they are often still low around December. Imports rise noticeably in July.

Most of the increase in imports which occurred in 1973 took place in the months of July and August.

Spain supplies this market from July to the end of the year, her exports reaching a peak in August, and by December imports from this source are fairly low. The other major supplier to this market, Italy, exports between July and September. Over the years, Chile's export season has been lengthened from March to May to March to August. Peru and South Africa both send melons in the first half of the year.

Honeydews and watermelons appear on this market between July and October, together with a few Cantaloupes; during the rest of the year imports are thought to consist almost entirely of honeydew melons.

Distribution Honeydews from Spain and Southern Hemisphere countries arrive by rail and sea while watermelons from Italy arrive by rail.

The Dutch generally prefer Cantaloupes, their own domestic type, but honeydews are the most popular imported type and are sold through the usual retail outlets.

Prices The average cif values of melons imported into the Netherlands during the last five years were as follows:–

Table 11

Average cif prices of melons imported into the Netherlands, 1969–1973

Gldr/kg

	1969	1970	1971	1972	1973
All sources	0.49	0.53	0.50	0.52	0.59
Spain	0.55	0.54	0.49	0.46	0.57
Italy	0.32	0.40	0.32	0.53	0.35
Chile	0.62	0.65	0.65	0.68	0.70

Source: Derived from Official Trade Returns

There has been a fluctuating upward trend in import prices. As on other European markets watermelons fetch the lowest import price; for Italian melons this was under 0.40 Gldr/kg (apart from 1972). Spanish melons showed a price decline until 1973 when their price rose. Chilean melons fetch the highest import price, partly because of their high transport costs and partly because they arrive at a time of year when melons are in short supply.

Switzerland

Seasonality Switzerland has the familiar pattern of imports; a peak in July and August, fewer melons arriving in June and September, and between November and April under 100 tonnes a month being imported. Around 70% of total imports arrive in July and August.

Italy supplies this market mainly from June to September, with most exports arriving in July and August. France exports mainly between June and October; most of her supplies also arrive in July and August. Spain supplies this market between May and February with a peak in September/October. Other minor countries supplying this market export mainly during the first six months of the year.

Honeydews arrive on this market all the year round; watermelons are only available during the summer months and Cantaloupes also arrive mainly in the summer, though small quantities arrive at other times of the year, chiefly from Israel.

Distribution Melons from France, Italy and Spain are sent to Switzerland by rail and are on sale in most large towns and cities. Honeydews from South Africa, Peru and Chile come by sea and rail. Cantaloupes from outside Europe are air-freighted in and sold mainly to restaurants and hotels – a few may go to exclusive retail outlets.

Prices The average cif values of melons imported into Switzerland during the last five years were as follows:–

Table 12

Average cif prices of melons imported into Switzerland, 1969–1973

Fr/kg

	1969	1970	1971	1972	1973
All sources	1.18	1.07	1.21	1.36	1.29
France	1.56	1.32	1.56	1.88	1.55
Italy	0.79	0.72	0.74	0.76	0.89
Spain	1.02	0.97	0.99	0.98	1.05
Israel	3.91	4.30	2.35	1.65	1.71
Chile	1.57	1.28	1.28	1.93	1.44
South Africa	1.79	1.80	2.17	1.82	2.58

Source: Derived from Official Trade Returns

Import prices have fluctuated somewhat over the past five years, and although no firm trend has been established prices have trended slightly upwards. Again Italian melons fetch the lowest import price, followed by those from Spain. The French melon has fluctuated in price as has the Chilean melon. In general the South African melon is the most highly priced on this market. The price paid for Israeli melons has tended to fall as more and different types of melons are imported from this source.

Sweden

Seasonality Although only quarterly import figures are available for Sweden, a similar pattern of imports appears to that of other countries; imports are highest in the third quarter, ie July to September, and smallest in the first quarter.

Before 1970 Spain supplied all her melons in the last six months of the year, but in that year her export season was extended to include the first quarter of the year. Chile supplies this market in the first six months of the year; most of her supplies arriving in the second quarter. Nearly all Italian imports arrive in the third quarter of the year as is the case with supplies from Denmark – Sweden is the only country to receive substantial quantities of melons from Denmark. The Netherlands supplies this market mainly in the second and third quarters and South Africa in the first two quarters.

There are honeydews on this market all the year round; watermelons are mainly available in the third quarter and there is a gap in the supply of Cantaloupes in the first quarter.

Distribution Most melons are sold through the usual retail outlets, but Ogens probably go mainly to the catering trade.

Prices The average cif values of melons imported into Sweden over the last five years have been as follows:–

Table 13

Average cif prices of melons imported into Sweden, 1969–1973

Kr/kg

		1969	1970	1971	1972	1973
All sources	16.6 to 30.9	1.57	1.55	1.38	1.37	1.40
	1.10 to 15.6	1.16	1.32	1.33	1.45	1.75
	Spain	1.06	1.09	1.12	1.21	1.31
	Chile	0.94	1.15	1.29	1.28	1.72
	Denmark	2.99	3.24	3.38	3.57	4.22
	Netherlands	2.39	2.44	2.96	2.49	2.41
	Italy	1.07	1.03	1.05	1.06	1.06
	Israel	2.55	1.78	1.49	1.39	2.08
	Peru	1.48	1.19	1.05	1.25	1.47

Source: Derived from Official Trade Returns

In 1969 the average value of melons imported during the summer months exceeded the value of fruit imported during the out-of-season period but by 1973 out-of-season melons were receiving the higher prices. Average import prices for melons imported during the summer have fallen as the proportion of cheaper Italian and Spanish produce imported has increased. Italian watermelons fetch the lowest import price on this market. Both Spanish and Chilean melons have risen in price, the rise in Chilean prices being the greater. Dutch melons have shown no price trend. Hothouse grown Cantaloupes from Denmark fetch by far the highest import price; this price has risen over the years and in 1973 was virtually double the price paid for any other melon. Israeli melons showed a steady decline in price to 1972 as a result of sending larger quantities of lower priced honeydews and watermelons, but in 1973 they rose to over 2 Kr/kg. Peruvian honeydews fetch a fluctuating price.

INTER-COUNTRY COMPARISON OF 1973 IMPORT PRICES

So far all the price data presented in this report for importing countries have, for reasons given in the note on page v, been in national currencies. This has, of course, precluded any inter-country price comparisons, but as exporters no doubt wish to supply the more remunerative markets, Table 14 has been prepared to show annual average import prices for 1973 on a standardised basis for the main suppliers of melons to each of the eight countries in question. The standard price unit used is Sterling – new pence per kilogramme.

Two aspects can be discussed on the basis of the data in Table 14; ie the division of suppliers into high and low value groups, and the comparative price levels in the various European countries. It should, however, be borne in mind that average import prices may not in fact be very good indicators of price levels for goods imported on consignment if adjustments, following final sale, to importers' initial estimates are not fully taken into account in the final rendering of the Trade Returns. However, in the absence of comprehensive wholesale price data, average import prices are the best data available. There is in addition the problem that the average annual prices are for all types of melon and hence may refer to a mixture of honeydew Cantaloupe and watermelons.

On the first aspect – division of suppliers into high and low value groups – it can be seen from Table 14 that in all the countries studied, melons from Italy (ie watermelons) fetched the lowest import prices – between 5.40 p/kg and 12.36 p/kg. In four out of the six countries importing from Italy, these melons fetched under 8p/kg.

Table 14

Comparison of cif import prices on the various European markets on a standard currency basis for 1973

p/kg

Importing country	Exporting countries					
	Spain	Italy	Israel	Chile	Netherlands	France
United Kingdom	10.15	7.11	20.81	16.22	23.04	18.67
Federal Republic of Germany	13.60	6.88	21.30	31.63	33.80	23.60
France	8.68	5.40	12.72	. . .	. . .	. . .
Belgium/Luxembourg	10.17	. . .	13.50	. . .	23.38	21.01
Italy	16.60	Greece (11.64)	11.04	. . .	. . .	54.67
Netherlands	8.98	5.51	13.94	11.02	. . .	12.28
Switzerland	14.58	12.36	23.75	20.00	. . .	21.53
Sweden	12.16	10.65	20.90	17.29	24.22	. . .

Note: . . . no price comparison possible

Source: Derived from Official Trade Returns

Spanish honeydews fetch the second lowest prices in most countries, and this is usually at least 2p/kg more than for watermelons. Imports of honeydews in the out-of-season period fetch a premium, demonstrating both higher marketing costs and lack of competition.

In general Cantaloupes are the highest priced of all melons and French and Dutch Cantaloupes usually fetch over 20p/kg. There is a market for air-freighted Ogens in the UK, Germany and Switzerland, which is one reason why prices for Israeli melons are higher in these countries than in the other four countries. (Israel sends mainly watermelons to France and Italy and these fetch a lower price). The high price paid by the Italians for French Cantaloupes in 1973 was in line with previous years' prices.

The second aspect – comparative price levels in the various importing countries – is probably the more important for potential exporters: is there in fact any advantage to be gained in terms of fob or producer returns by exporting to some countries rather than others?

Taking into account the difference in price levels between the three types of melon, the importing countries can be divided roughly into three groups – low, medium and high priced markets.

The countries in the low priced group are France and the Netherlands; both produce Cantaloupes domestically and although their imports have risen the trade

does not seem to be prepared to pay high prices for imported melons. In both countries there is also a large production of other cheap fruit, again probably helping to keep down the prices which imported melons make. Of the two, France is the least attractive as regards prices for exporters.

The UK, Belgium and Sweden form the second, medium-priced group. Sweden falls into this category as the long haul inevitably means that prices will be higher here than in most other places in Europe. Swedish importers also require high quality produce and this, combined with the distances involved, means that returns on the Swedish Market may be somewhat lower than at first appears. In both Belgium and the UK domestic production of melons is limited or negligible, but in the UK the air-freighted Ogen is much appreciated; this is not the case in Belgium.

Italy, Switzerland and Germany comprise the high priced group. Italy is included in this group as in fact the prices received on this market for imported watermelons are well above average, and the prices for Spanish honeydews and French Cantaloupes are the highest quoted. Unfortunately most demand in Italy is for watermelons, and due to the problems of transporting this fruit over long distances it is probably only those countries in or near the Mediterranean who will be able to supply watermelons to Italy. Switzerland and Germany probably present an exporter with the best returns. The standard of living in both countries is high, both import air-freighted Ogens, and in both the out-of-season market is growing.

Prospects

Unfortunately the published trade returns do not show any breakdown of imports by type of melon. However, each melon has a rather distinct market and imports of various types of melon dominate the different markets under discussion. In the UK imports of honeydews predominate; honeydews are also important on the Dutch and Swedish markets. In Germany, France and Italy imports of watermelons are dominant and in Switzerland and Belgium imports of Cantaloupes are of major importance. Watermelons are of secondary importance in Belgium. the Netherlands, Switzerland and Sweden. Honeydew melons comprise the bulk of out-of-season imports in all countries studied.

Bearing in mind this difference in the markets for the three main types of melons, the prospects for each type will be discussed separately in the paragraphs below.

Honeydew melons are scarce between January and May, and especially in April/May and the beginning of June as supplies from the Southern Hemisphere are declining and Spanish melons do not come onto the market until late June. There is a demand for honeydews at this time of year although prices are unlikely to be high enough to cover the costs of air-freighting. In this context it should be noted that many South American countries have now built up a trade with Europe in honeydews at this time of year.

Watermelons are not available from October to May. Supplies to fill this gap would have to come from outside the Mediterranean area and this raises transportation problems. Air-freight is one way of dealing with the perishable nature of watermelons but it is unlikely that prices would be high enough to cover the cost of air-freighting to Europe. It is interesting to note that supplies of sea-freighted watermelons have been received in the UK from as far afield as the USA and sold successfully; these watermelons arrive just before the peak European production season.

Several countries e.g. South Africa, Zambia and Ethiopia, have been air-freighting Ogens to Europe from January to April, but supplies are still limited at this time and any country which can produce a good quality Ogen and has reasonable air-freight costs should be able to compete. However, such countries, unless they had markedly lower production costs, would probably find it difficult to compete with Israel, whose air-freight costs are likely to be lower, once her export season starts, and therefore should concentrate on supplying this market when supplies from Israel are not available.

The last decade has seen a marked increase in imports of melons into Western Europe and although the present recession may have a temporary adverse effect, a continuing upward trend is expected. The trade is mainly a summer/early autumn intra-European trade and opportunities for suppliers outside Europe at this time are not considered good. However, with the exception of the UK and latterly Sweden, the out-of-season market has continued to expand and potential new suppliers are advised to concentrate on this period. Despite the static nature

of the UK's out-of-season market, it is easily the biggest and sources of supply have changed recently. There are still opportunities for other new suppliers able to supply quality produce. Switzerland and Germany, followed by the Netherlands, would appear also to offer good prospects for new suppliers during the out-of-season period. However, supplying countries should remember that demand could easily be oversupplied and that buyers require high quality produce.

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Appendix A

Importers of melons

Note: The following list gives the names of some of the firms which are known to the Tropical Products Institute to be trading in this commodity, but the list should not be regarded as exhaustive. Inclusion in the list does not imply that TPI has any knowledge of the financial standing of the firms.

UNITED KINGDOM

American Fruit Importers
Stands 1–7, Trading Hall No. 1
Western International Market,
Hayes Road,
Southall,
Middlesex

Broome and Green (London) Ltd.,
A165–170 Fruit and Vegetable Market
New Covent Garden Market,
London, S.W.8

Francis Nicholls
London Fruit Exchange
Spitalfields,
London, E.1. 6HG

Griffin and Brand (European) Ltd.,
71 Brushfield Street,
London, E.1.

Fyffes-Monro Produce Ltd.,
A133–140 Fruit and Vegetable Market,
New Covent Garden Market,
London, S.W.8

R. E. Jenkinson Ltd.,
A114–119 Fruit and Vegetable Market,
New Covent Garden Market,
London, S.W.8

Mack and Edwards Sales Ltd.,
Office/Box No. C134–113
Fruit and Vegetable Market,
New Covent Garden Market,
London, S.W.8

T. J. Poupart Ltd.,
D153–162 Fruit and Vegetable Market,
New Covent Garden Market,
London, S.W.8

Louis Reece
99 Commercial Street
London, E.1.

Ridley and Houlding Ltd.,
C148–150 Fruit and Vegetable Market,
New Covent Garden Market,
London, S.W.8

J. O. Sims Ltd.,
Winchester Square
Borough Market
London, S.E.1 9AQ

P. Weiser (London) Ltd.,
D101–102 Fruit and Vegetable Market,
New Covent Garden Market.
London, S.W.8

FEDERAL REPUBLIC OF GERMANY

Continentale Frucht Import – GmbH
8 München 70
Gross Markethalle
Thalkirchnerstrasse 128

Doego
46 Dortmund
Feldstrasse 84

Fruchtimport P Van Wylick GmbH
4000 Dusseldorf
Postfach 3309

FEDERAL REPUBLIC OF GERMANY —contd.

Harder, Meiser and Co
29 Breitenweg
28 Bremen 1

T Port
Kontorhaus Grossmarkt
2 Hamburg

Willy Bruns
2 Hamburg 1
Oberhatenstrasse

FRANCE

Ets E Azoulay et Cie
103 Avenue de Bourgogne
M.I.N. de Paris — Rungis
(94) Rungis

Ets. Omer-Decuglis et Fils
69 Rue de Montpellier
M.I.N. de Paris — Rungis
and
37—39 Cours Julian
Marseilles 2

Ets S Tedesco et Cie
170 Cours Charlemagne
Lyons 2

BELGIUM/LUXEMBOURG

Agrofruit Company (Belgium)
167 Italielei
Antwerp

Lecocq
19 Boulevard d'Ypres
Brussels

John van Haecht
11 Rue R Lauwers
Hoeilaart
Brussels

NETHERLANDS

Albert Heijn
Ankersmidplein 2
Zaandam

Algemeene Vruchten Import
Maatschappij N.V.
53 Walenburgerweg
Rotterdam 4

Velleman en Tas N.V.
Fruit Exchange
Rotterdam

SWITZERLAND

J Berri
67 Sihlquai
8005 Zurich

Co-op Schweiz
Thiersteinerallee 14
4002 Basel

Migros
152 Limmatstrasse
8031 Zurich

L G Pelli
55 Konradstrasse
Zurich 5

Tremblay and Burgermeister S.A.
49 Route des Jeunes
Geneva 26

Sante Tribo
72 Konradstrasse
8031 Zurich

SWEDEN

Kooperative Forbundet
Fack
S—104 65
Stockholm 15

Moller and Co AB
23—25 Importorvagen
S—121 73 Johnanneshov
Stockholm

Appendix B

Trade Statistics

LIST OF TABLES

1. Melons: Exports from Spain
2. Watermelons: Exports from Israel
3. Other melons: Exports from Israel
4. Melons: Imports into the United Kingdom
5. Melons: Imports into the Federal Republic of Germany
6. Melons: Imports into France
7. Melons: Imports into Italy
8. Melons: Imports into Belgium/Luxembourg
9. Melons: Imports into the Netherlands
10. Melons: Imports into Switzerland
11. Melons: Imports into Sweden

Table 1

Melons — Exports from Spain

		1964	1965	1966	1967	1968	1969	1970	1971	1972	1973
Tendral Melons	Tonnes	...	...	20 070	23 182	28 454	15 443	22 038	19 771	18 097	12 026
	£'000	...	...	689	821	1 032	597	874	767	760	625
Liso Melons	Tonnes	...	...	...	...	17 741	28 899	33 852	47 007	51 046	39 969
	£'000	...	...	...	...	471	766	898	1 218	1 393	1 317
Other Melons	Tonnes	...	...	20 473	23 383	11 590	7 982	7 087	8 756	7 531	3 375
	£'000	...	...	540	624	353	273	250	324	262	271
TOTAL	Tonnes	32 247	41 985	40 543	46 565	57 785	52 324	62 977	75 534	76 674	55 370
of which to:—	£'000	897	1 071	1 229	1 445	1 856	1 636	2 022	2 309	2 415	2 213
Belgium/Luxembourg	Tonnes	148	174	206	444	998	196	1 288	715	963	890
	£'000	5	5	5	13	31	6	20	23	26	29
Denmark	Tonnes	91	198	100	303	155	226	125	367	335	229
	£'000	3	6	4	8	7	8	5	11	9	8
France	Tonnes	2 184	2 180	2 378	998	1 334	2 249	3 090	4 995	4 427	3 385
	£'000	65	56	73	32	45	71	95	146	136	129
Federal Republic of Germany	Tonnes	1 634	1 585	1 795	2 019	2 782	4 318	5 559	6 947	8 471	7 562
	£'000	48	37	55	56	77	116	149	184	234	252
Ireland	Tonnes	345	458	449	382	608	264	522	505	483	345
	£'000	8	13	13	11	18	7	15	15	14	14
Italy	Tonnes	108	149	256	489	430	381	1 104	1 052	1 467	830
	£'000	4	5	10	20	16	22	61	54	89	77
Netherlands	Tonnes	445	697	368	580	501	1 090	1 414	2 842	4 449	4 152
	£'000	11	18	13	21	15	31	39	77	124	139
Norway	Tonnes	153	208	106	204	195	194	249	289	306	291
	£'000	7	8	5	11	10	12	14	9	12	17

Table 1—*continued*

		1964	1965	1966	1967	1968	1969	1970	1971	1972	1973
United Kingdom	Tonnes	26 045	30 252	29 390	33 511	38 219	38 417	40 708	51 339	49 923	33 924
	£'000	710	743	872	1 009	1 129	1 103	1 197	1 457	1 498	1 234
Sweden	Tonnes	208	333	289	282	456	735	585	1 010	1 342	1 424
	£'000	6	11	15	14	12	26	27	38	43	52
Switzerland	Tonnes	228	370	474	683	896	894	1 466	1 281	913	580
	£'000	9	9	12	17	24	20	61	40	27	20
Brazil	Tonnes	–	115	661	1 300	2 327	2 327	1 859	2 057	1 267	963
	£'000	–	4	23	59	142	149	124	149	97	92
Canada	Tonnes	394	248	319	376	400	42	334	579	310	22
	£'000	12	10	17	21	24	4	25	39	25	2
USA	Tonnes	–	4 727	3 202	4 590	8 203	739	4 357	1 191	1 429	606
	£'000	–	129	87	131	290	43	181	51	79	48
Other countries	Tonnes	264	291	550	404	281	252	317	345	589	167
	£'000	9	17	25	22	16	18	9	16	2	30

Notes: . . . not available — nil or negligible

Source: *Estadistica del Comercio Exterior de Espana.* Ministerio de Hacienda

Table 2

Watermelons — Exports from Israel

		1964	1965	1966	1967	1968	1969	1970	1971	1972	1973
TOTAL	Tonnes	680	87	—	98	64	540	1 332	3 339	7 797	6 646
of which to:—	£'000	26.1	3.2	—	3.2	4.5	28.8	72.0	219.6	487.6	446.5
Federal Republic of Germany	Tonnes	191	9	—	75	—	—	—	289	1 342	1 204
	£'000	8.4	0.3	—	2.4	—	—	—	18.5	85.1	93.7
United Kingdom	Tonnes	479	68	—	18	23	91	171	813	1 801	1 472
	£'000	17.3	2.5	—	0.6	1.6	5.4	10.8	56.7	104.7	99.8
Belgium/Luxembourg	Tonnes	—	—	—	—	—	—	—	62	119	179
	£'000	—	—	—	—	—	—	—	4.1	7.2	14.0
Switzerland	Tonnes	—	—	—	—	—	—	—	48	85	130
	£'000	—	—	—	—	—	—	—	2.9	6.0	12.3
Rep. of South Africa	Tonnes	—	—	—	—	35	74	—	—	—	—
	£'000	—	—	—	—	2.5	3.7	—	—	—	—
France	Tonnes	—	—	—	—	—	99	1 085	1 073	2 282	1 313
	£'000	—	—	—	—	—	5.8	58.2	68.3	140.7	88.0
Italy	Tonnes	—	—	—	—	—	276	—	988	2 022	2 099
	£'000	—	—	—	—	—	13.7	—	64.6	130.7	144.4
Yugoslavia	Tonnes	—	—	—	—	—	—	74	—	—	—
	£'000	—	—	—	—	—	—	2.9	—	—	—
Sweden	Tonnes	—	—	—	—	—	—	—	66	127	160
	£'000	—	—	—	—	—	—	—	4.5	11.2	8.3
Other countries	Tonnes	10	10	—	5	6	—	2	—	19	89
	£'000	0.4	0.4	—	0.2	0.4	0.2	0.1	—	2.0	6.0

Note: — nil or negligible

Source: *Israel's Foreign Trade.* Central Bureau of Statistics.

Table 3

Other Melons — Exports from Israel

		1964	1965	1966 (a)	1967 (b)	1968	1969	1970	1971	1972	1973
TOTAL	Tonnes	1 432	825	922	1 102	1 633	1 777	1 855	3 752	5 178	7 285
	£'000	105.2	82.9	127.3	125.6	336.1	292.6	340.9	460.9	597.9	812.7
France	Tonnes	12	13	46	37	25	271	341	82	102	153
	£'000	1.7	2.0	8.5	6.7	7.5	20.9	22.6	14.0	20.0	23.2
Federal Republic of Germany	Tonnes	117	40	76	96	148	–	47	345	574	753
	£'000	5.9	4.9	10.7	13.7	36.3	–	26.3	47.3	62.0	73.5
United Kingdom	Tonnes	1 242	759	768	936	1 354	1 109	1 132	3 054	4 115	4 412
	£'000	91.9	73.4	103.6	99.3	275.1	206.5	214.0	347.9	465.6	519.5
Switzerland	Tonnes	11	8	9	6	16	–	2	34	25	53
	£'000	2.3	1.8	2.3	1.5	4.2	–	6.7	7.8	6.0	18.8
Kenya	Tonnes	12	–	15	15	26	10	–	–	–	–
	£'000	0.9	–	1.0	1.5	1.6	0.8	–	–	–	–
Thailand	Tonnes	36	–	–	–	–	–	–	–	–	–
	£'000	2.2	–	–	–	–	–	–	–	–	–
Belgium/Luxembourg	Tonnes	–	2	3	3	8	–	4	13	20	22
	£'000	–	0.2	0.6	0.9	2.0	–	1.7	3.3	3.6	5.7
Italy	Tonnes	–	–	–	–	6	–	17	33	43	1 004
	£'000	–	–	–	–	1.2	–	8.4	11.1	9.6	74.8
Austria	Tonnes	–	–	–	4	8	17	11	12	7	8
	£'000	–	–	–	0.8	1.6	3.7	2.9	2.1	0.8	2.2
Denmark	Tonnes	–	–	1	2	4	1	–	5	10	33
	£'000	–	–	0.3	0.5	0.8	–	–	1.2	1.6	4.4
Norway	Tonnes	–	–	–	–	2	6	14	6	11	4
	£'000	–	–	–	–	0.4	0.4	1.7	1.2	0.8	0.9

Table 3—*continued*

		1964	1965	1966 (a)	1967 (b)	1968	1969	1970	1971	1972	1973
Sweden	Tonnes	—	—	—	—	8	14	28	45	89	141
	£'000	—	—	—	—	0.8	0.8	3.7	4.9	6.4	13.6
Ethiopia	Tonnes	—	—	—	—	8	—	—	—	—	—
	£'000	—	—	—	—	0.4	—	—	—	—	—
USA	Tonnes	—	—	—	—	4	15	—	—	—	—
	£'000	—	—	—	—	0.8	2.9	—	—	—	—
Other countries	Tonnes	2	3	4	3	16	335	259	123	182	702*
	£'000	0.3	0.6	0.3	0.7	3.4	56.6	52.9	20.1	21.5	76.1

Notes: (a) of which 756 tonnes were Ogen melons and 166 tonnes Tal Dvash melons (b) of which 811 tonnes were Ogen melons and 291 tonnes Tal Dvash melons * of which 303 tonnes to Singapore — nil or negligible

Source: *Israel's Foreign Trade.* Central Bureau of Statistics.

Table 4

Melons — Imports into the United Kingdom

		1964	1965	1966	1967	1968	1969	1970	1971	1972	1973
TOTAL	Tonnes	41 879	42 341	40 163	43 401	50 027	55 379	54 592	64 083	58 698	48 983
of which from:—	£'000	2 542	2 845	2 742	3 217	3 486	4 031	4 457	5 106	5 379	6 140
Cyprus	Tonnes	2 518	2 105	1 328	1 721	1 344	1 708	897	1 415	381	90
	£'000	117	100	74	84	94	116	85	121	49	18
France	Tonnes	354	514	367	386	489	436	366	480	338	557
	£'000	54	77	58	70	59	53	46	62	67	104
Italy	Tonnes	136	–	–	244	323	406	522	481	238	422
	£'000	8	–	–	19	21	27	30	36	16	30
Netherlands	Tonnes	986	697	358	551	277	182	262	413	499	1 506
	£'000	109	82	53	86	47	27	37	63	103	321
Spain	Tonnes	29 273	31 589	30 615	34 418	40 385	43 169	44 566	52 953	47 235	36 106
	£'000	1 665	1 947	1 919	2 271	2 465	2 873	3 314	3 604	3 714	3 664
Hungary	Tonnes	287	–	–	210	129	134	85	53	83	76
	£'000	12	–	–	15	7	8	4	8	7	7
Israel	Tonnes	1 503	807	766	873	1 467	1 647	2 027	3 760	6 603	6 410
	£'000	200	199	201	227	300	328	404	765	972	1 334
Canary Islands	Tonnes	75	105	274	343	448	489	395	169	165	113
	£'000	6	12	40	60	54	74	50	35	41	29
Morocco	Tonnes	–	–	–	–	43	148	–	–	–	–
	£'000	–	–	–	–	2	7	–	–	–	–
Rep of South Africa	Tonnes	1 004	1 255	694	1 294	1 909	1 423	954	1 354	1 270	1 426
	£'000	93	118	73	134	174	149	98	141	181	266
Argentina	Tonnes	298	85	229	102	–	–	–	–	–	–
	£'000	28	8	21	12	–	–	–	–	–	–

Table 4—*continued*

		1964	1965	1966	1967	1968	1969	1970	1971	1972	1973
Chile	Tonnes	5 356	4 707	5 352	2 909	3 030	4 879	2 968	1 228	721	561
	£'000	242	284	287	215	244	295	244	114	92	91
Peru	Tonnes	–	–	–	–	50	425	932	685	197	300
	£'000	–	–	–	–	6	30	79	69	16	33
Greece	Tonnes	–	–	–	–	–	59	254	689	370	449
	£'000	–	–	–	–	–	3	15	39	24	33
USA	Tonnes	–	–	–	–	–	–	7	68	319	232
	£'000	–	–	–	–	–	–	3	12	51	48
Zambia	Tonnes	–	–	–	–	–	–	–	28	27	104
	£'000	–	–	–	–	–	–	–	8	13	54
Other countries	Tonnes	89	477	180	350	133	274	357	307	252	631*
	£'000	8	18	16	24	13	41	48	29	33	108

Notes: – nil or negligible. * of which Colombia 93 tonnes, Ecuador 73 tonnes

Source: *The Trade of the United Kingdom* HM Customs and Excise

Table 5

Melons — Imports into the Federal Republic of Germany

Not shown separately before 1966		1966	1967	1968	1969	1970	1971	1972	1973
TOTAL	Tonnes	9 647	12 403	14 396	22 601	25 607	37 304	45 261	48 461
of which from:—	'000 DM	5 185	6 982	7 359	13 115	14 177	21 346	25 188	27 408
France	Tonnes	190	227	195	142	327	316	276	486
	'000 DM	199	310	275	258	470	428	440	700
Netherlands	Tonnes	105	161	117	76	84	101	112	136
	'000 DM	137	262	204	157	161	219	258	280
Italy	Tonnes	6 785	7 897	9 609	15 603	16 578	26 381	29 632	34 267
	'000 DM	3 110	3 970	4 092	7 804	7 959	12 716	12 557	14 306
Spain	Tonnes	1 353	1 551	2 446	4 281	5 602	6 632	7 930	6 606
	'000 DM	1 095	1 197	1 539	3 244	3 310	5 015	6 071	5 482
Greece	Tonnes	173	583	769	756	1 421	1 249	3 498	2 363
	'000 DM	126	332	389	498	986	837	1 801	1 008
Hungary	Tonnes	489	1 315	704	1 215	824	1 039	637	427
	'000 DM	117	350	158	320	164	264	183	109
Rep of South Africa	Tonnes	48	32	134	68	48	—	87	228
	'000 DM	46	43	182	103	47	—	145	407
Ecuador	Tonnes	—	—	—	—	62	241	322	53
	'000 DM	—	—	—	—	54	199	278	76
Peru	Tonnes	—	—	—	—	121	119	73	87
	'000 DM	—	—	—	—	105	90	104	132
Chile	Tonnes	215	120	137	157	164	112	49	197
	'000 DM	116	120	107	179	141	129	97	381
Israel	Tonnes	76	88	186	195	305	679	2 260	3 033
	'000 DM	175	257	374	467	709	1 025	2 801	3 935

Table 5—*continued*

Not shown separately before 1966		1966	1967	1968	1969	1970	1971	1972	1973
Ethiopia	Tonnes	–	–	–	10	–	–	–	28
	'000 DM	–	–	–	20	–	–	–	50
Rumania	Tonnes	166	313	–	–	–	–	–	–
	'000 DM	40	76	–	–	–	–	–	–
Colombia	Tonnes	–	–	–	–	–	207	50	–
	'000 DM	–	–	–	–	–	227	45	–
Venezuela	Tonnes	–	–	–	–	–	–	55	54
	'000 DM	–	–	–	–	–	–	60	43
Other countries	Tonnes	47	116	99	98	71	228	280	496
	'000 DM	23	62	39	65	71	197	348	499

Note: – nil or negligible

Source: *Der Aussenhandel.* Statistisches Bundesamt.

Table 6

Melons — Imports into France

		1964	1965	1966	1967	1968	1969	1970	1971	1972	1973
TOTAL	Tonnes	10 138	9 101	12 106	13 392	14 623	17 182	18 253	21 029	24 621	28 405
of which from:—	'000 Fr	4 951	4 986	6 806	8 048	7 234	10 145	11 106	11 199	14 508	23 015
Spain	Tonnes	2 335	2 228	2 397	1 511	2 190	2 662	3 403	4 660	5 633	8 655
	'000 Fr	1 598	1 658	2 219	1 134	1 659	1 834	2 226	3 404	3 160	7 619
Israel	Tonnes	13	13	43	34	38	162	311	976	2 119	1 823
	'000 Fr	98	72	129	142	156	256	395	1 104	2 093	2 355
Italy	Tonnes	6 551	5 745	8 307	10 053	11 141	13 143	12 719	14 817	16 455	16 524
	'000 Fr	2 150	2 223	3 156	4 856	4 317	6 683	6 622	6 915	8 386	8 931
Morocco	Tonnes	1 194	942	1 289	1 646	925	897	1 570	451	220	554
	'000 Fr	1 063	848	1 224	1 488	676	894	1 625	490	201	1 006
Greece	Tonnes	–	–	–	–	–	208	227	–	–	–
	'000 Fr	–	–	–	–	–	209	167	–	–	–
Niger	Tonnes	–	–	–	–	–	27	–	–	35	–
	'000 Fr	–	–	–	–	–	74	–	–	101	–
Senegal	Tonnes	–	–	–	–	–	34	–	18	109	230
	'000 Fr	–	–	–	–	–	105	–	104	460	913
Other countries	Tonnes	45	173	70	148	329	49	23	107	50	619
	'000 Fr	42	185	78	428	426	90	71	182	107	2 191

Note: — Nil or negligible

Source: *Commerce Extérieur.* Direction Générale Des Douanes Et Droits Indirectes

Table 7

Melons — Imports into Italy

		1964	1965	1966	1967	1968*	1969*	1970*	1971*	1972*	1973
TOTAL	Tonnes	1 376	2 066	2 303	1 698	3 142	4 242	6 449	6 862	8 462	8 575
of which from:—	'000 lira	158 853	247 571	279 408	239 141	358 461	502 586	773 571	880 251	1 134 728	1 593 062
France	Tonnes	110	134	99	213	158	115	183	174	176	241
	'000 lira	35 848	53 959	31 841	65 554	49 363	55 137	92 460	96 831	112 098	175 575
Spain	Tonnes	159	222	339	460	709	924	1 071	1 595	1 404	857
	'000 lira	15 088	22 534	41 796	51 055	69 924	88 419	104 427	163 405	207 879	189 775
Netherlands	Tonnes	—	—	—	—	25	26	6	—	—	—
	'000 lira	—	—	—	—	7 606	7 096	1 520	—	—	—
Greece	Tonnes	35	60	244	345	1 579	2 082	3 133	2 639	3 263	4 266
	'000 lira	2 286	5 163	15 235	30 659	137 496	191 532	320 203	274 326	314 249	662 100
A R Egypt	Tonnes	1 049	1 537	1 522	677	645	754	1 182	1 421	1 214	893
	'000 lira	101 980	149 664	172 239	90 582	87 462	106 461	153 469	213 588	230 417	217 626
Israel	Tonnes	—	—	—	—	7	341	864	980	2 211	2 254
	'000 lira	—	—	—	591	1 242	53 670	100 057	124 378	244 948	330 626
Ethiopia	Tonnes	7	26	44	—	—	—	—	—	—	—
	'000 lira	372	5 866	7 074	—	—	—	—	—	—	—
Argentina	Tonnes	14	40	44	—	—	—	—	—	—	—
	'000 lira	2 815	5 920	8 806	—	—	—	—	—	—	—
Spanish North Africa	Tonnes	1	42	—	—	—	—	—	—	—	—
	'000 lira	90	3 886	—	—	—	—	—	—	—	—
Other countries	Tonnes	1	5	11	3	19	—	10	53	194	64
	'000 lira	374	579	2 417	700	5 368	271	1 435	7 723	25 137	17 360

Notes: *Includes small quantitites of other fresh fruit — nil or negligible

Source: *Commercio Con L'Estero.* Instituto Centrale di Statistica

Table 8

Melons — Imports into Belgium/Luxembourg

		1964	1965	1966	1967	1968	1969	1970	1971	1972	1973
TOTAL	Tonnes	2 006	1 886	2 218	2 877	3 124	3 943	4 544	4 990	5 496	7 842
of which from:—	'000 Fr	20 256	19 864	26 968	33 012	27 847	37 189	52 916	62 059	73 930	104 453
France	Tonnes	414	600	537	1 077	1 310	1 342	2 297	2 312	2 214	3 612
	'000 Fr	5 447	7 120	10 375	15 611	13 737	15 647	29 476	39 438	46 423	67 628
Netherlands	Tonnes	413	317	188	155	116	93	85	—	138	141
	'000 Fr	7 091	5 982	3 838	3 596	1 677	1 321	1 422	—	1 731	2 938
Italy	Tonnes	923	766	1 036	1 054	1 145	1 416	...	1 293	...	...
	'000 Fr	4 901	4 306	7 041	7 053	6 775	8 966	...	8 384	...	...
Chile	Tonnes	—	—	62	21	54	16	...	—	—	—
	'000 Fr	—	—	999	355	860	217	...	—	—	—
Rep of South Africa	Tonnes	25	—	—	21	40	45	29	27	27	23
	'000 Fr	341	—	—	387	656	753	600	576	512	361
Spain	Tonnes	—	—	—	239	259	630	757	...	1 017	1 585
	'000 Fr	—	—	—	3 688	2 544	7 237	10 838	...	10 840	14 368
Israel	Tonnes	—	—	—	—	—	—	—	—	165	399
	'000 Fr	—	—	—	—	—	—	—	—	2 293	4 801
Ecuador	Tonnes	—	—	—	—	16	13	...	—	—	—
	'000 Fr	—	—	—	—	170	157	...	—	—	—
Greece	Tonnes	—	—	—	—	—	146	...	—	—	—
	'000 Fr	—	—	—	—	—	1 043	...	—	—	—
Other countries	Tonnes	231	203	395	296	184	242	1 376	1 358	1 935	2 082
	'000 Fr	2 476	2 456	4 715	2 070	1 428	1 848	10 580	13 661	12 131	14 357

Notes: — nil or negligible ... not available

Source: *Commerce Exterieur.* L'Institut National de Statistique

Table 9

Melons — Imports into the Netherlands

		1964	1965	1966	1967	1968	1969	1970	1971	1972	1973
TOTAL	Tonnes	487	744	786	878	1 166	1 929	2 697	4 171	5 618	8 016
of which from:—	'000 Gldr	240	339	371	503	569	942	1 426	2 070	2 929	4 760
Belgium/Luxembourg	Tonnes	20	20	45	41	66	69	79	...	...	...
	'000 Gldr	17	16	37	36	32	43	57	...	...	...
France	Tonnes	—	25	—	88	74	—	—	9	79	326
	'000 Gldr	—	13	—	77	51	—	—	12	65	254
Italy	Tonnes	—	111	60	45	223	535	517	489	653	1 460
	'000 Gldr	—	43	22	29	65	169	207	157	344	514
Spain	Tonnes	327	432	355	432	470	995	1 599	2 947	3 995	4 269
	'000 Gldr	150	189	192	232	237	550	868	1 453	1 846	2 419
Hungary	Tonnes	53	28	104	121	77	89	84	219	126	138
	'000 Gldr	22	11	30	43	21	28	15	71	35	51
Chile	Tonnes	65	105	193	108	153	77	212	164	142	653
	'000 Gldr	38	52	71	54	89	48	137	106	96	460
Rep of South Africa	Tonnes	—	—	—	17	32	—	—	4	74	182
	'000 Gldr	—	—	—	18	23	—	—	13	71	237
Peru	Tonnes	—	—	—	—	—	—	89	155	146	193
	'000 Gldr	—	—	—	—	—	—	39	104	131	164
Ecuador	Tonnes	—	—	—	—	—	—	22	88	67	32
	'000 Gldr	—	—	—	—	—	—	20	73	55	34
Colombia	Tonnes	—	—	—	—	—	—	—	37	51	52
	'000 Gldr	—	—	—	—	—	—	—	39	40	59
USA	Tonnes	—	—	—	—	—	—	—	—	70	59
	'000 Gldr	—	—	—	—	—	—	—	—	51	41
Senegal	Tonnes	—	—	—	—	—	—	—	—	21	143
	'000 Gldr	—	—	—	—	—	—	—	—	30	182
Other countries	Tonnes	22	23	29	26	71	164	95	59	194	509
	'000 Gldr	13	15	19	14	51	104	83	42	165	345

Notes: — nil or negligible ... not available

Source: *Maanstatistiek Van De Invoer.* Centraal Bureau Voor de Statistiek

Table 10

Melons — Imports into Switzerland

		1964	1965	1966	1967	1968	1969	1970	1971	1972	1973
TOTAL	Tonnes	4 626	4 532	5 008	5 164	5 242	5 822	7 389	8 346	8 367	11 171
of which from:—	'000 Fr	4 354	4 467	4 818	5 929	5 043	6 860	7 932	10 092	11 372	14 394
France	Tonnes	1 503	1 490	2 136	2 045	2 224	2 293	3 344	4 091	3 914	5 476
	'000 Fr	2 238	2 326	2 624	3 325	2 788	3 588	4 409	6 385	7 372	8 485
Italy	Tonnes	2 791	2 590	2 253	2 333	2 047	2 351	2 344	2 973	3 255	4 073
	'000 Fr	1 821	1 741	1 610	1 903	1 398	1 858	1 686	2 195	2 484	3 645
Spain	Tonnes	257	370	489	621	853	1 039	1 494	1 029	859	1 042
	'000 Fr	189	287	404	447	628	1 057	1 444	1 021	842	1 099
Turkey	Tonnes	22	—	40	—	—	—	—	—	—	—
	'000 Fr	11	—	11	—	—	—	—	—	—	—
Israel	Tonnes	11	7	9	7	18	34	27	85	187	387
	'000 Fr	49	33	43	33	67	133	116	200	309	662
Rep of South Africa	Tonnes	—	13	20	21	11	33	20	6	17	38
	'000 Fr	—	21	34	32	21	59	36	13	31	98
Chile	Tonnes	17	34	45	75	76	35	85	39	14	57
	'000 Fr	16	31	55	71	78	55	109	50	27	82
USA	Tonnes	—	—	—	10	8	10	6	—	5	19
	'000 Fr	—	—	—	44	38	43	19	—	23	71
Mexico	Tonnes	—	—	—	12	3	—	—	—	15	2
	'000 Fr	—	—	—	34	18	—	—	—	56	11
Kenya	Tonnes	—	—	—	—	—	5	5	—	—	—
	'000 Fr	—	—	—	—	—	22	22	—	—	—
Venezuela	Tonnes	—	—	—	—	—	—	6	—	—	—
	'000 Fr	—	—	—	—	—	—	24	—	—	—
Peru	Tonnes	—	—	—	—	—	—	45	20	31	8
	'000 Fr	—	—	—	—	—	—	41	20	41	15
Senegal	Tonnes	—	—	—	—	—	—	—	10	16	42
	'000 Fr	—	—	—	—	—	—	—	59	76	149
Colombia	Tonnes	—	—	—	—	—	—	—	56	5	—
	'000 Fr	—	—	—	—	—	—	—	86	22	—
Ecuador	Tonnes	—	—	—	—	—	—	—	19	26	6
	'000 Fr	—	—	—	—	—	—	—	29	39	12
Other countries	Tonnes	25	28	16	40	2	22	13	18	23	21
	'000 Fr	30	28	37	40	7	45	26	34	50	65

Note: — nil or negligible

Source: *Statistique de la Suisse.* Bureau Federal de Statistique

Table 11

Melons — Imports into Sweden

		1964	1965	1966	1967	1968	1969	1970	1971	1972	1973
16th June–30th September											
Honeydews and Cantaloupe melons	Tonnes	159	285	237	171	300	455	364	468	896	970
	'000 Krnr	200	317	272	211	371	536	459	549	1 087	1 261
Other melons	Tonnes	378	346	508	609	806	1 061	1 024	1 154	1 163	1 501
	'000 Krnr	701	665	984	1 373	1 486	1 840	1 692	1 685	1 739	2 191
1st October–15th June											
All melons	Tonnes	478	506	654	735	871	1 120	1 102	1 294	1 172	1 249
	'000 Krnr	519	611	729	898	1 073	1 302	1 459	1 722	1 702	2 185
TOTAL	Tonnes	1 015	1 137	1 399	1 515	1 887	2 636	2 490	2 916	3 231	3 720
of which from:–	'000 Krnr	1 410	1 593	1 985	2 482	2 930	3 678	3 610	3 956	4 528	5 637
Spain	Tonnes	238	335	323	344	546	914	852	1 348	1 496	1 578
	'000 Krnr	238	346	360	425	613	965	933	1 509	1 813	2 064
Chile	Tonnes	154	198	321	339	397	535	353	200	178	149
	'000 Krnr	140	196	315	335	375	501	406	257	228	256
Denmark	Tonnes	148	105	114	217	254	352	273	180	205	145
	'000 Krnr	421	339	398	747	862	1 051	885	608	732	612
Netherlands	Tonnes	173	167	189	195	198	167	183	141	93	75
	'000 Krnr	260	304	323	401	442	399	446	417	232	181
Bulgaria	Tonnes	48	106	190	138	83	–	–	–	–	–
	'000 Krnr	53	124	237	183	115	–	–	–	–	–
Italy	Tonnes	70	76	131	113	229	360	360	391	533	919
	'000 Krnr	82	107	186	173	272	385	372	409	565	974
Rumania	Tonnes	39	20	15	49	37	48	10	44	–	–
	'000 Krnr	36	21	12	55	50	48	11	47	–	–
Rep of South Africa	Tonnes	17	44	32	46	65	62	18	15	49	90
	'000 Krnr	21	62	46	66	94	89	29	25	78	182

Table 11—*continued*

Melons— Imports into Sweden

		1964	1965	1966	1967	1968	1969	1970	1971	1972	1973
Cyprus	Tonnes	13	50	45	–	–	–	–	–	–	–
	'000 Krnr	14	46	40	–	–	–	–	–	–	–
France	Tonnes	17	–	16	9	–	–	–	–	42	–
	'000 Krnr	26	–	23	15	–	–	–	–	50	–
Argentina	Tonnes	52	–	–	–	–	–	14	13	–	–
	'000 Krnr	57	–	–	–	–	–	15	11	–	–
Israel	Tonnes	–	–	–	–	–	33	78	134	261	369
	'000 Krnr	–	–	–	–	–	84	139	199	364	767
Hungary	Tonnes	11	–	–	–	–	47	45	100	147	85
	'000 Krnr	13	–	–	–	–	29	30	75	106	80
Peru	Tonnes	–	11	–	–	–	46	177	221	93	85
	'000 Krnr	–	12	–	–	–	68	211	233	116	125
Ecuador	Tonnes	–	–	–	–	–	–	34	25	52	8
	'000 Krnr	–	–	–	–	–	–	52	39	87	19
USA	Tonnes	–	–	–	–	–	–	–	–	10	80
	'000 Krnr	–	–	–	–	–	–	–	–	32	147
AR Egypt	Tonnes	–	–	–	–	–	–	–	22	11	9
	'000 Krnr	–	–	–	–	–	–	–	49	39	11
Other countries	Tonnes	52	25	23	65	71	71	111	82	61	128
	'000 Krnr	49	36	45	82	107	59	81	78	86	219

Note: – nil or negligible

Source: *Sveriges Inforsel Och Utforsel.* Statistiska Centralbyran

Appendix C

Standard for watermelons

Standard concerning the marketing and quality control of watermelons moving in trade between European countries.*

I DEFINITION OF PRODUCTS

This standard applies to watermelons grown from varieties of *Citrullus vulgaris* Schrader, to be supplied fresh to the consumer, watermelons for processing being excluded.

II QUALITY REQUIREMENTS

A General

The purpose of the standard is to define the quality requirements for watermelons at the dispatching stage.

B Minimum requirements

(i) The watermelons must be:
- whole;
- firm and sufficiently ripe;
- sound (subject to the special provisions for each class);
- not split;
- clean and in particular free from any impurities and from earth and practically free from foreign matter;
- free of all abnormal external moisture;
- free of foreign smell or taste.

(ii) The colour and taste of the flesh must be typical of the variety. The state of ripeness must be such as to allow the watermelons to stand transport and handling, and to meet market requirements at the place of destination.

C Classification

Watermelons are graded in two quality classes, as follows:

(i) *Class I*

Watermelons in this class must be of good quality.

They must be:
- well formed, allowing for the characteristics of each variety;
- without any cracks or bruises (small superficial cracks are not considered as defects);
- free from any signs of damage by parasites or disease, especially by anthracnose.

*Source: UN/ECE AGRI/WP.I/EUR. STAN.21.

A slight degree of discolouration is allowed for the paler part of the melon which has been in contact with the ground during the period of growth.

The stems of the watermelon must not exceed 5 cm in length.

(ii) *Class II*

This class comprises watermelons of marketable quality which do not qualify for inclusion in Class I, but satisfy the minimum requirements defined above and have the following defects:

- a slight defect in shape;
- a slight degree of discolouration of the rind and of the flesh;
- slight bruises or superficial damage caused mechanically or by parasites or disease.

III SIZING

(i) Sizing is determined by the net weight of the watermelons and the minimum weight is fixed at 1.5 kg.

(ii) Watermelons should be graded by the following scale:

- 1.5 kg and less than 3 kg each
- 3 kg and less than 5 kg each
- 5 kg and less than 7 kg each
- 7 kg each and over.

This scale of sizes is not compulsory for watermelons transported in bulk.

IV TOLERANCES

In each package and, in the case of transport in bulk, in each load, quality and size tolerances for watermelons are allowed as follows:

A Quality tolerances

(i) *Class I*

At most 15 per cent by number or weight of watermelons not satisfying the requirements for Class I, but meeting the requirements of the class immediately below.

(ii) *Class II*

At most 15 per cent by number or weight of watermelons not satisfying the requirements of Class II but fit for consumption.

B Size tolerances for both classes

At most 15 per cent by number or weight of watermelons conforming to the size immediately below or above that stated on the package, subject to a minimum weight of 1 kg per watermelon.

V Packaging and Presentation

A Uniformity

The contents of each package and, in the case of transport in bulk, of each lot of the total consignment, must be uniform, particularly in respect of variety and class. In addition, for Class I the shape and colour of the rind of the watermelons must be uniform.

B Packaging

Watermelons may be transported either in packages or in bulk form.

The materials, and particularly the paper used to line the trays, must be new, clean and sufficiently inert with respect to the fruit with which they are in

contact, that is to say they must not transmit to the fruit any elements imparted by their constituents which may affect the composition of the fruit and in particular its organoleptic characteristics.

The use of materials, and particularly of paper, bearing printed particulars relating to the packer, the sender or the produce, is allowed on condition that the printed portion does not come into direct contact with the produce, and that the printing has been done with a non-toxic ink so as to avoid any risk of the fruit being contaminated by components of the ink passing through the materials.

Watermelons transported in bulk must be separated from the floor and walls of the vehicles by a suitable protective material, which must be new and clean and not liable to transfer any abnormal taste or smell to the fruit.

VI MARKING

Each package must bear the following particulars, legibly and indelibly marked on the outside:

A Identification

Packer
Dispatcher — Name and address or code mark

B Nature of Produce

'Watermelons' (when the produce is not visible from the outside).

C Origin of produce

District of origin, or national, regional or local trade name.

D Commercial specifications

- class
- size of units (except for watermelons transported in bulk) expressed in minimum and maximum weight of the watermelons
- number if in closed packages.

E Official control mark (optional)

Printed in England for Her Majesty's Stationery Office by Hobbs the Printers Ltd., Southampton
(1712) Dd357545 3M 1/76 G3313